

# User Manual

## SPListX for SharePoint 2010



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**Vyapin Software Systems Private Limited**

Website: <http://www.vyapin.com/>

Sales Contact: [sales@vyapin.com](mailto:sales@vyapin.com)

Technical Support: [support@vyapin.com](mailto:support@vyapin.com)

# Table of Contents

<b>1</b>	<b><i>SPListX Introduction</i></b>	<b>1</b>
1.1	About SPListX	1
1.2	Technical Support	3
1.3	System requirements	3
1.4	How to Activate the Software?	4
<b>2</b>	<b><i>SPListX Features</i></b>	<b>6</b>
2.1	Task Manager	7
2.2	Change Application Data Folder Location	11
2.3	Create new Task	13
2.4	Edit an existing task - Edit Task	15
2.5	Copy an existing task	16
2.6	Delete an existing task	18
2.7	Run a task	20
2.8	Run a Task from Command Line	23
2.9	Create Windows Task	26
2.10	Task Status	28
2.11	Task History	30
2.12	Profile Manager	32
2.13	Manage Favorites	35
2.14	Active Directory Profile Manager	39
2.15	File Share Manager	42
2.16	Remove a task history item	45
2.17	Cleanup History	46
2.18	Proxy Server Settings	47
2.19	Web Single Sign-on Dashboard	50

## Table of Contents

2.20	View Activity Log	55
<b>3</b>	<b><i>Export SharePoint List contents using the browse option</i></b>	<b>58</b>
3.1	Create Task	58
3.2	Export Options	60
3.3	SharePoint source location	61
3.4	Items to Export	64
3.5	List View Options	76
3.6	Version Options	79
3.7	Permission Options	83
3.8	Export Conditions	85
3.9	Document Packaging Options	95
3.10	Destination Folder Options	97
3.11	File Settings	100
3.12	Metadata File Settings	103
3.13	Task Settings	106
<b>4</b>	<b><i>Export SharePoint List contents using a batch descriptor file</i></b>	<b>111</b>
4.1	Create Task	111
4.2	Create Batch Descriptor File	113
4.3	Export Options	116
4.4	Batch descriptor file	117
4.5	List View Options	119
4.6	Version Options	122
4.7	Permission Options	126
4.8	Export Conditions	128
4.9	Document Packaging Options	134
4.10	Destination Folder Options	136
4.11	File Settings	139

## Table of Contents

4.12	Metadata File Settings	142
4.13	Task Settings	145
<b>5</b>	<b>Export SharePoint List contents using the search option</b>	<b>150</b>
5.1	Create Task	150
5.2	Create Search Batch Descriptor File	152
5.3	SharePoint User Credential	154
5.4	Search URL Settings	156
5.5	Search Conditions	161
5.6	Column Settings Options	168
5.7	Version Options	170
5.8	Permission Options	174
5.9	Export Conditions	176
5.10	Document Packaging Options	182
5.11	Destination Folder Options	184
5.12	File Settings	187
5.13	Metadata File Settings	190
5.14	Task Settings	193
5.15	Working on Search Results	197
5.16	Working on SharePoint 2010 Search Results	197
5.17	Working on SharePoint 2007 Search Results	200
5.18	How to Create Batch File Using Search Results	203
<b>6</b>	<b>References</b>	<b>211</b>
6.1	Error Messages and Resolution	211
6.2	Troubleshooting	213
6.3	How to Uninstall SPListX?	214
<b>7</b>	<b>Index</b>	<b>217</b>

# 1 SPListX Introduction

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## 1.1 About SPListX

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**SPList Export for SharePoint 2010 (SPListX)** is a powerful application to export document / picture library contents and associated metadata and list items, including associated file attachments to the Windows File System. Export SharePoint libraries, folders, documents, list items, version histories, metadata and permissions to the desired destination location in the Windows File System.

SPListX supports all versions of SharePoint 2010 / 2007 / 2003 in a single product. SPListX works with SharePoint Online in Office 365, Microsoft SharePoint Server 2010, Microsoft SharePoint Foundation 2010, Microsoft Office SharePoint Server 2007, Windows SharePoint Services 3.0, Microsoft SharePoint Portal Server 2003, and Windows SharePoint Services 2.0 environments.

- Export sites, lists, and document libraries and reduce data losses that might occur from hardware failures, power outages, or other problems.
- Export lists & document libraries for offline collaboration
- Archive list contents to comply with retention policies
- Archive old document versions & their metadata for regulatory compliance
- Backup SharePoint contents regularly for disaster recovery & restore procedures, if required
- Migrate documents & metadata to another DMS / ECM application
- Perform in-depth analysis of metadata in MS-Excel
- Perform the export process based on the line entries in the batch descriptor file
- Export files, list items and attachments based on SharePoint search results

## **Chapter-1-SPListX Introduction**

### **Key Advantages:**

- Simple solution to export folders / documents along with their associated metadata from SharePoint document libraries.
- Export list items along with their file attachments from SharePoint lists such as Tasks, Calendar, Contacts, Survey, Discussion Boards, Announcements, Links, Issue Tracking and Custom Lists.
- Export from multiple SharePoint lists to file server / network shares / local computer.
- Maintain source folder structure and version history when exporting data from the SharePoint list / document library.
- Export list items / documents / pictures based on user-defined data filters (constructed based on SharePoint columns).
- Automate export tasks through command-line or Windows Task Scheduler interface.
- Propagate original Created Date & Last Modified Date in SharePoint to the Windows File System fields for each folder / document.

### 1.2 Technical Support

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Please send all Technical Support questions to support@vyapin.com.

Please send us the following additional information if you are reporting a problem:

- 1) Versions of SPListX that you are evaluating or you have registered with us. Version information could be found in the "About" Screen and in "Help".
- 2) Additional services or resource consuming processes/applications (like anti-virus) running in the background on SPListX installed machine as well as the source MOSS / WSS and destination.
- 3) Hardware configuration of the machine where SPListX and Microsoft SharePoint Server 2010/Microsoft SharePoint Foundation 2010/MOSS/WSS is installed.
- 4) 'Service Pack' version of Windows Server & Microsoft SharePoint Server 2010/Microsoft SharePoint Foundation 2010/MOSS / WSS running currently.
- 5) Send us the "SPListXErrorLog.txt" available in the common application data path of SPListX (e.g., *<Application Data Folder> \SPListX\Log\SPListXErrorLog.txt*).
- 6) SPListX error logs and activity log files (ActivityLog.txt, ActivityErrors.txt, MetadataErrors.txt and SPListXErrorLog.txt) stored in the Common application data path. For example: *<Application Data Folder> \SPListX\TaskHistory\<taskname>\<timestamp>*.

**NOTE:** *<Application Data Folder>* is the common location where SPListX tasks and task history is stored in the computer running *SPListX application*. The *<Application Data Folder>* can be found from the **Help -> About** screen. The default path of *<Application Data Folder>* is as follows:

- a) Windows XP, Windows Server 2003-C:\Documents and Settings\All Users\Documents
- b) Windows 7/ Vista, Windows Server 2008-C:\Users\Public\Documents

### 1.3 System requirements

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- **Hardware:** Intel Pentium processor, 10 MB disk space to install SPListX
- **Software:** - Windows 7 / Vista / XP (or) Windows Server 2008 / 2003 with the latest service packs and .NET Framework 4.0 or higher.

To work with SharePoint Online in Office 365, Windows 7 / Windows Server 2008 R2 with the latest service packs and .NET Framework 4.0 or higher is recommended.

### 1.4 How to Activate the Software?

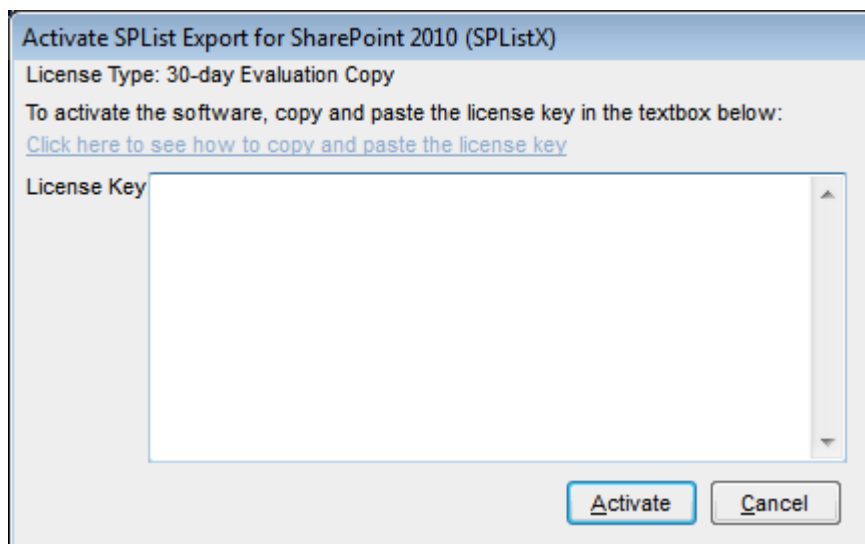
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Once you purchase the software online or through any one of our resellers, you will receive a sale notification through e-mail from our sales department. We will send you an e-mail with the necessary instructions to activate the software.

In case you do not receive an e-mail from our sales team after you purchase the software, please send the following information to our sales department at sales@vyapin.com with the sales order number:

- **Company Name:** End-user Company Name
- **Location:** City & Country for the Company Name given above

Please allow 12 to 24 hours from the time of purchase for our sales department to process your orders.



**Image 1 - Activate screen**

Perform the following steps to activate the software:

- 1) Download evaluation/trial copy of software from the respective product page available in our website at <http://www.vyapin.com/>
- 2) Install the software on the desired computer.
- 3) You will receive a license key through e-mail as soon as the purchase process is complete.
- 4) Click 'Activate' in Help -> About -> Activate menu to see the Activate dialog (as shown in Image 1).



## Chapter-1-SPListX Introduction

- 5) Please Copy the license key sent to you through email, and pastes it in the 'License Key' textbox. For help on how to copy the license key, click 'Click here to see how to copy and paste the license key' link in the Activate dialog (as shown in Image 2).

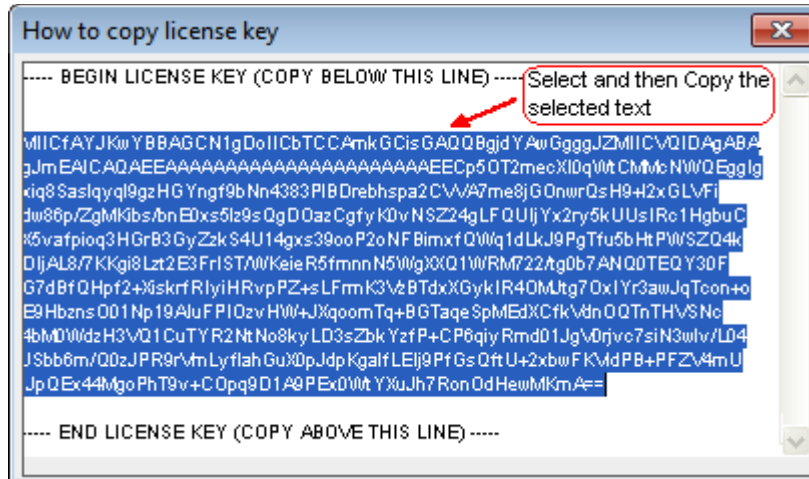


Image 2 - How to copy license key screen

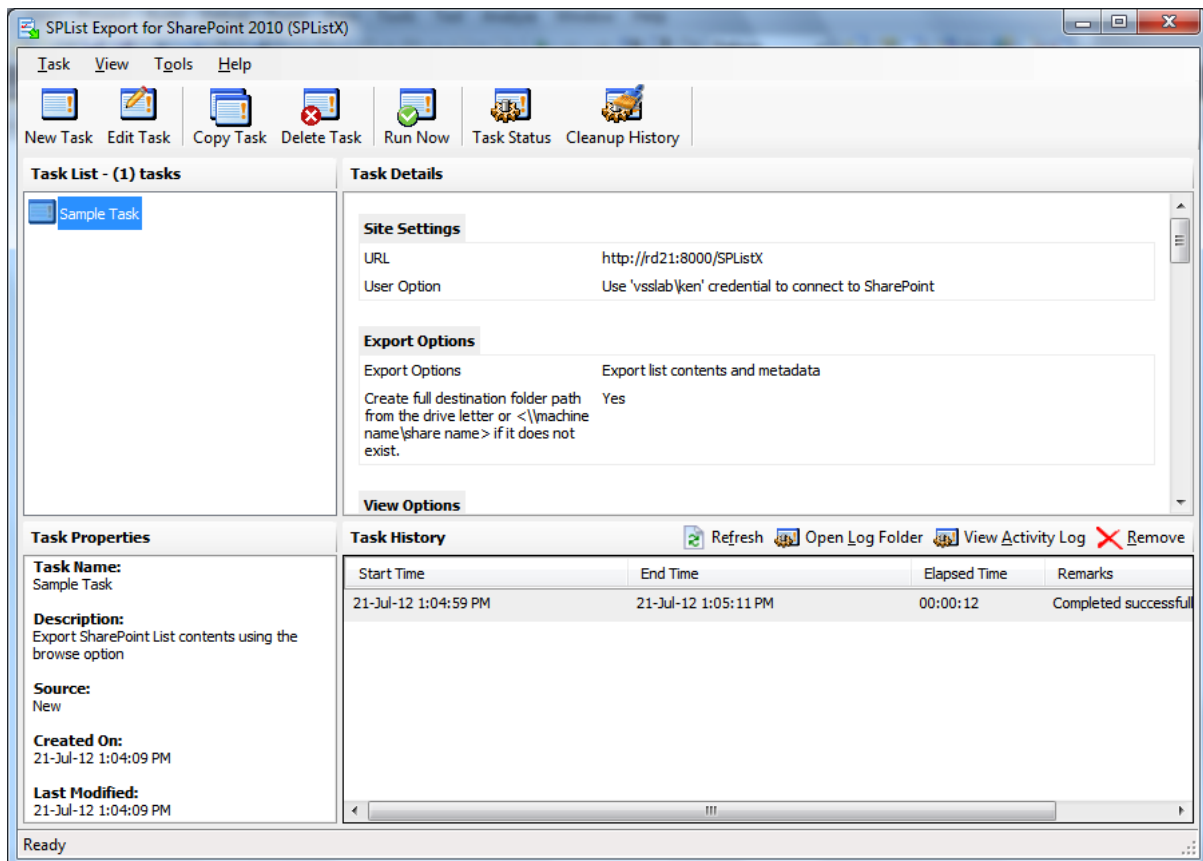
## 2 SPListX Features

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- **Active Directory Profile Manager**
- **Create task**
- **Edit task**
- **Copy an existing task**
- **Delete an existing task**
- **Run a task**
- **Run a task from command line**
- **Profile Manager**
- **File Share Manager**
- **Proxy Settings**
- **Manage Favorites**
- **Create Windows Task**
- **Task Manager**
- **Task History**
- **Export SharePoint List contents using browse options**
- **Export SharePoint List contents using a batch descriptor file**
- **Export SharePoint List contents using the search option**

### 2.1 Task Manager

**SPListX** creates export tasks for export process setup to export documents, list items and metadata from SharePoint to file system. **SPListX Task Manager** in the main application window will help you manage **SPListX** export tasks and their corresponding task history. **SPListX Task Manager** provides menu and tools to work with the tasks easily.



**SPListX Task Manager** contains a standard menu bar and toolbar along with four panes to manage **SPListX** export task effectively:

- 1) Task List pane
- 2) Task Properties pane
- 3) Task Details pane
- 4) Task History pane

## Chapter-2-SPListX Features

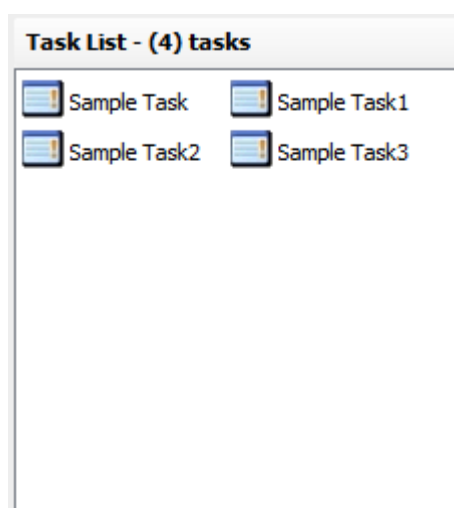
### Standard menu bar and toolbar

**Standard menu bar and toolbar** contain all the commands (or actions) to work with a SPListX export task.



### Task List:

**Task List** pane contains all export tasks created by the user. Task related operations such as Edit Task, Copy Task, Delete Task and Run Now can be performed based on the selected task in the Task List pane. The remaining panes will change their content based on the selected task. Total task count will be displayed at the top of the banner.



### Task Properties:

**Task Properties** pane displays the information about the currently selected task in Task List pane. It provides information about Task Name, Task Type, Created On and Last Modified On. If the currently selected task is setup to run using a Windows Scheduled Task (setup to run at a scheduled time), then the Task Properties adds additional information about schedule task such as run as and last Run status etc.

## Chapter-2-SPListX Features

Task Properties	
<b>Task Name:</b>	Sample Task
<b>Description:</b>	Export SharePoint List contents using a batch descriptor file
<b>Source:</b>	New
<b>Created On:</b>	15-Feb-12 5:23:48 PM
<b>Last Modified:</b>	15-Feb-12 5:30:36 PM

### Task Details:





**Task Details** pane displays the task settings about currently selected task in Task List pane.

Task Details	
<b>Site Settings</b>	
URL	http://rd06:9004/Seahorse
User Option	Use currently logged on user context to connect to SharePoint
<b>Export Options</b>	
Export Options	Export metadata only
Create full destination folder path from the drive letter or <\\machine name\share name> if it does not exist.	Yes
<b>Version Options</b>	
Export version	Latest version only
<b>View Column Settings</b>	

## Chapter-2-SPListX Features

### Task History:

**Task History** pane maintains every task run information as a list. It displays the required information about task execution status. It displays Task's Start Time, End Time, Elapsed Time and Remarks.

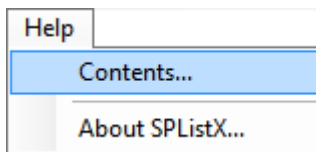
Task History			
 Refresh  Open Log Folder  View Activity Log  Remove			
Start Time	End Time	Elapsed Time	Remarks
09-Jan-12 11:08:07 AM	09-Jan-12 11:08:44 AM	00:00:36	Completed successfully
09-Jan-12 11:06:42 AM	09-Jan-12 11:06:56 AM	00:00:14	Incomplete: refer activity log
05-Jan-12 3:08:56 PM	05-Jan-12 3:09:54 PM	00:00:57	Completed successfully

### 2.2 Change Application Data Folder Location

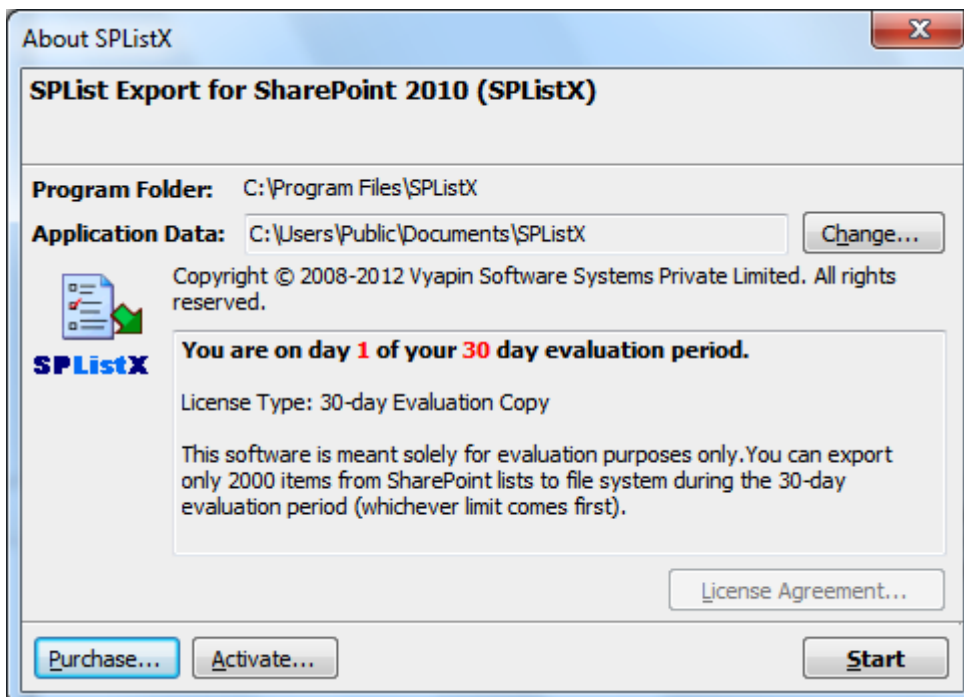
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SPListX enables you to change **Application Data** folder location, where SPListX export tasks and related settings, activity logs and error logs are stored, at any time after installing SPListX software. To change the Application Data folder location, perform the following steps given below:

- 1) Select **About SPListX** from **Help** menu



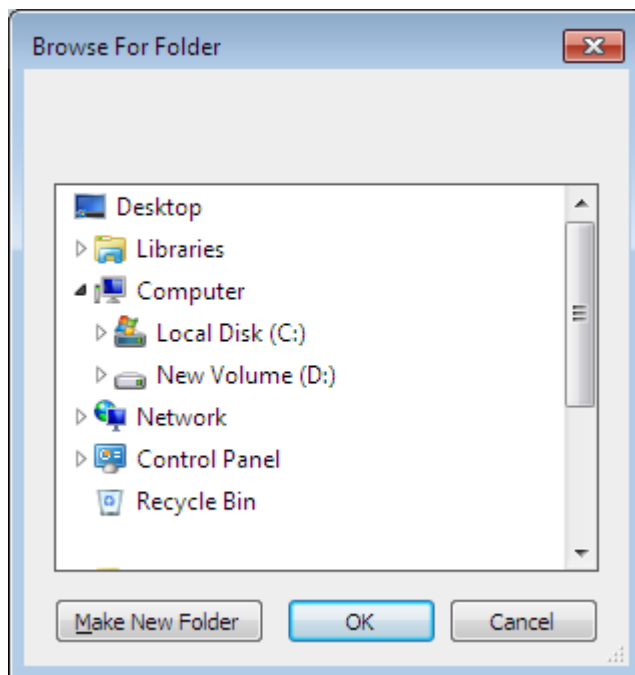
- 2) The **About SPListX** dialog appears as shown below:



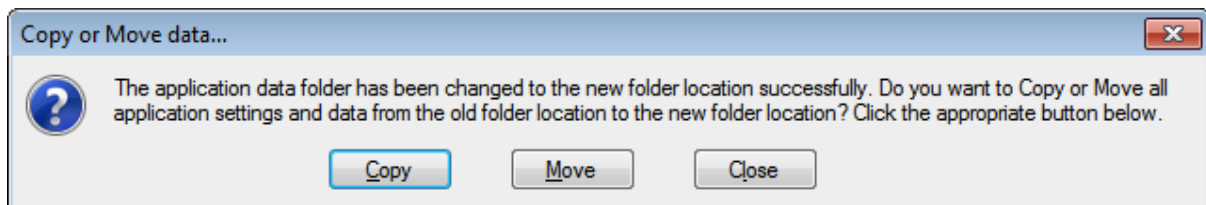
- 3) Click **Change...** button to change **Application Data** folder location of SPListX application.

## Chapter-2-SPListX Features

The **Browse for Folder** location dialog will appear as shown below:



- 4) Select a desired folder location and Click **OK**. The folder location can be local drives or mapped network drives.
- 5) SPListX provides an option to copy or move the existing SPListX application settings (SPListX export task settings, task histories, activity logs, error logs etc.) to the new location once you change the Application Data Folder. Once you specify the new Application Data folder location, SPListX will prompt you to copy or move existing SPListX application settings to the new location as shown below:



- 6) Click the desired action (**Copy / Move / Close**) to proceed. SPListX will use the new Application Data folder location henceforth.



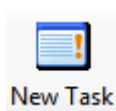
### 2.3 Create new Task

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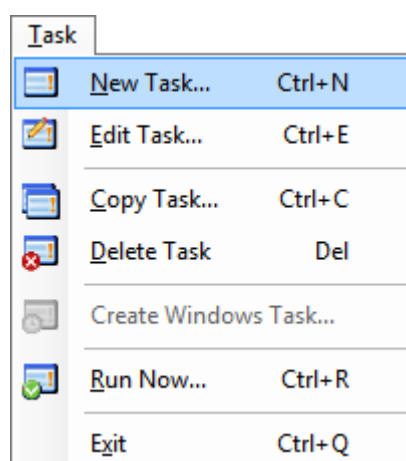
You can create a task to export folders, files, list items including attachments along with their metadata from SharePoint list to file system or network share. SPListX facilitates exporting files, list item attachments and its associated metadata from SharePoint list using the following export methods (or task types):

- A. Export SharePoint List contents using the browse option:** Export folders, files and list items including attachments along with metadata to the file system by browsing the SharePoint list contents.
- B. Export SharePoint List contents using a batch descriptor file:** Export folders, files and list items including attachments along with metadata from SharePoint list to file system based on the entries in the descriptor file.
- C. Export SharePoint List contents using the search option:** Export folders, files and list items including attachments along with metadata from SharePoint list to file system based on SharePoint search results.

- 1) Click **New Task** from SPListX main screen.



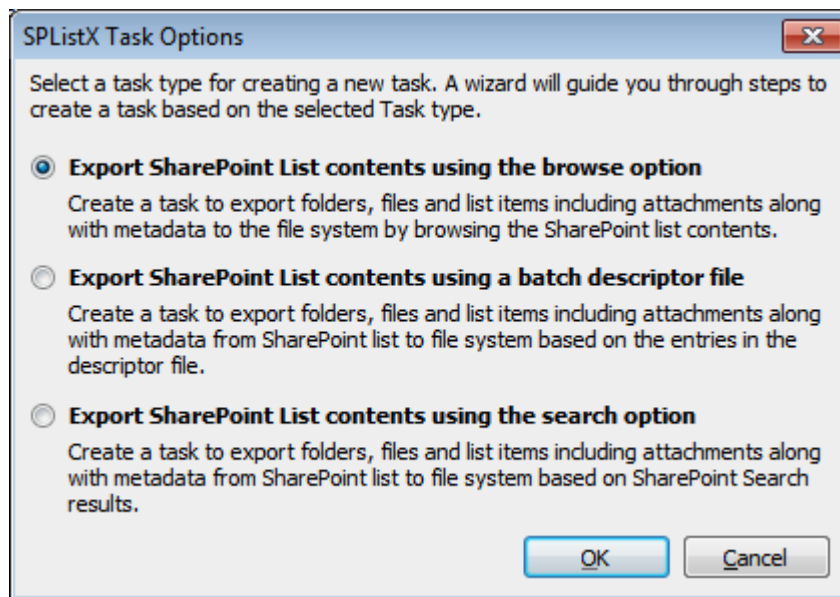
Or Select **New Task** from **Task** menu



Or Press **Ctrl+N**

## Chapter-2-SPListX Features

2) Select a task type in **New Task** dialog and click **OK**.



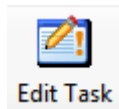
- a) Create a task to **Export SharePoint List contents using the browse option**
- b) Create a task to **Export SharePoint List contents using a batch descriptor file**
- c) Create a task to **Export SharePoint List contents using the search option**

### 2.4 Edit an existing task - Edit Task

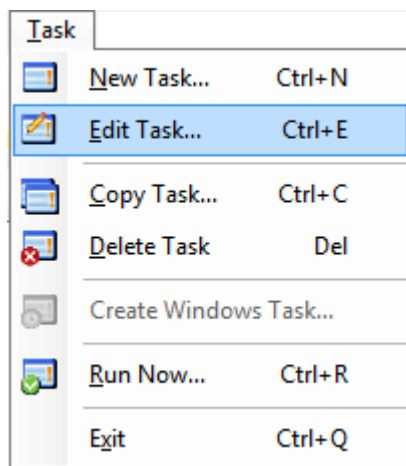
---

To edit an existing task:

- 1) Select a task in the **Task List** pane.
- 2) Click **Edit Task** from SPListX main screen.



Or Select **Edit Task** from **Task** menu



Or Press **Ctrl+E**

- 3) **SPListX Task Wizard** will load the selected task settings and appears as seen in Create New Task wizard. However, some of the options may be disabled when editing a task.

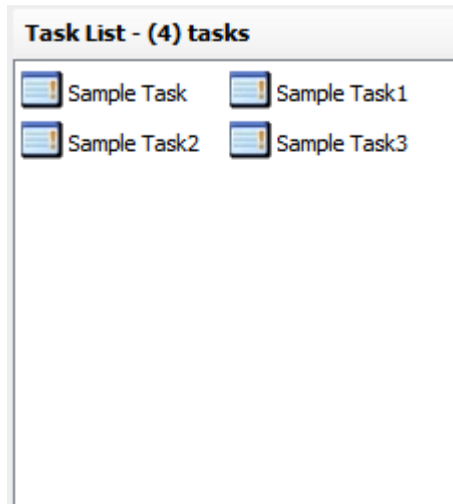
- a) Edit **Export SharePoint List contents using the browse option**
- b) Edit **Export SharePoint List contents using a batch descriptor file**
- c) Edit **Export SharePoint List contents using the search option**

### 2.5 Copy an existing task

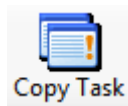
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To copy or create a new task from an existing SPListX export task:

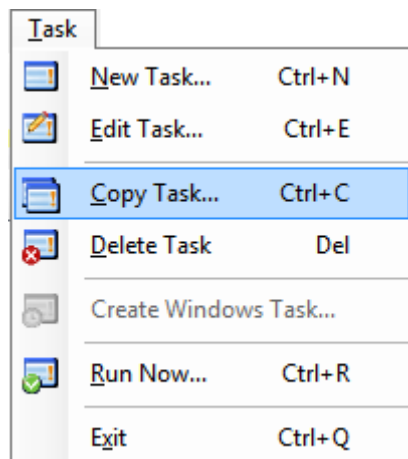
- 1) Select a task from the **Task List** pane.



- 2) Click **Copy Task** from *SPListX* main screen.

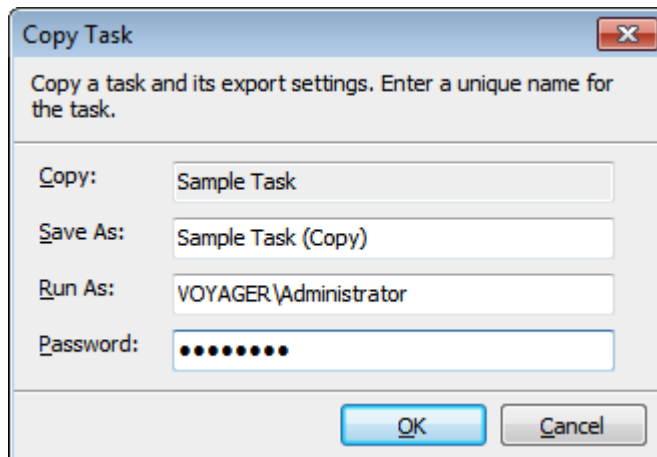


Or Select **Copy Task** from **Task** menu



## Chapter-2-SPListX Features

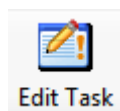
- 3) In **Copy Task** dialog, enter a new task name in **Save As** text-box; specify a **Run As** account and **Password** (if applicable) and Click **OK** to create a new task with the same export settings specified in the selected task.



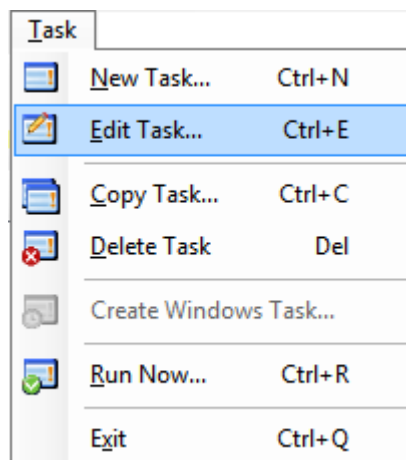
### Edit Task

To edit an existing Task:

- 1) Select a **Task** in the **Task List** Pane.
- 2) Click **Edit Task** from *SPListX Main Screen*.



Or Select **Edit Task** from **Task** Menu.



Or Press **Ctrl+E**

## Chapter-2-SPListX Features

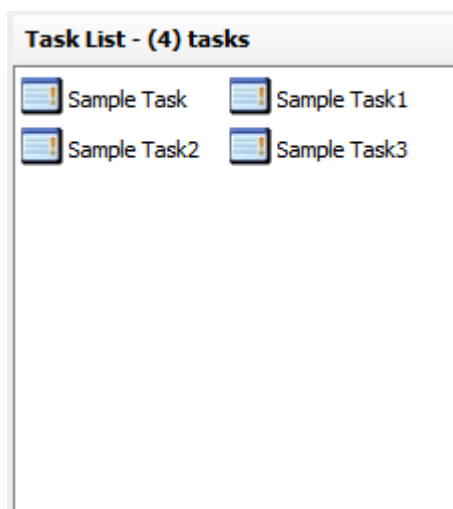
- 3) **SPListX Task Wizard** will load the selected task settings and appears as seen in Create New Task wizard. However, some of the options may be disabled when editing a task.
- 4) These are the following Edit Task functions:
  - a) edit Export SharePoint List contents using the browse option
  - b) edit Export SharePoint List contents using a batch descriptor file
  - c) edit Export SharePoint List contents using the search option

### 2.6 Delete an existing task

---

To delete a SPListX export task:

- 1) Select a task from **Task List** pane.

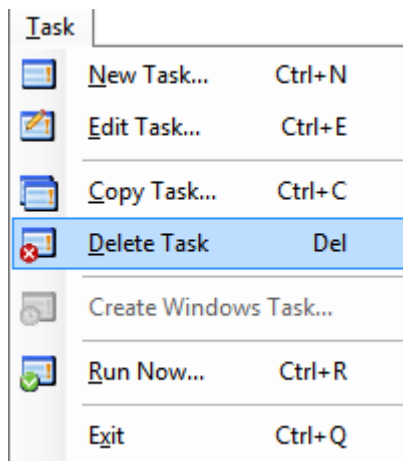


- 2) Click **Delete Task** from SPListX main screen.



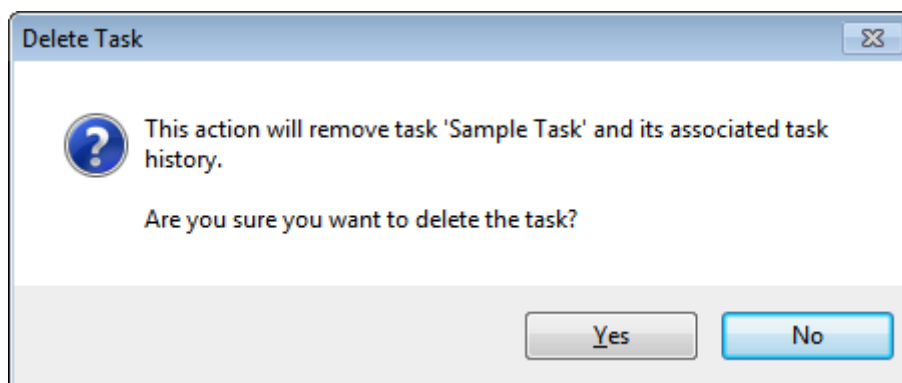
## Chapter-2-SPListX Features

Or Select **Delete Task** from **Task** menu



Or Press **Del** key

3) Click **Yes** in **Delete Task** message-box shown below:



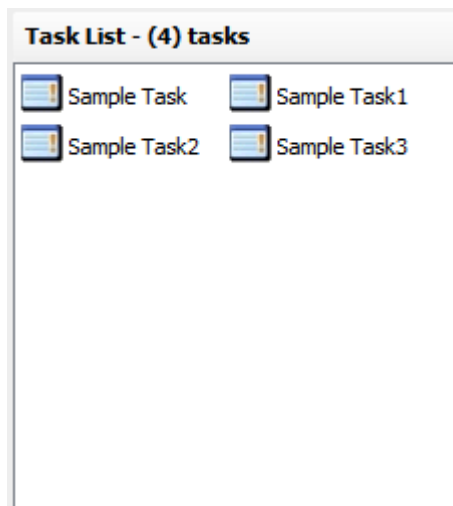
**NOTE:** Deleting a task will permanently delete the selected task and its task history items.

### 2.7 Run a task

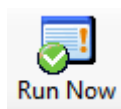
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**SPListX 'Run Now' feature** allows the user to instantiate a task anytime after the task has been created. To run a SPListX export task:

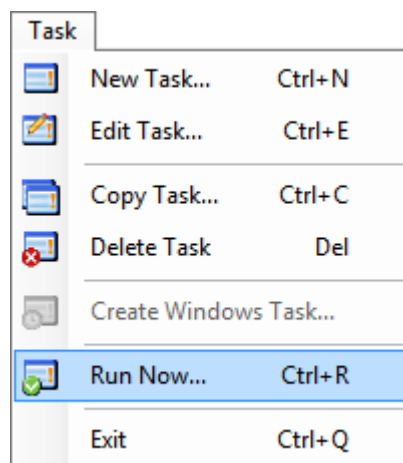
- 1) Select a task from **Task List** pane.



- 2) Click **Run Now** from SPListX main screen.



Or Select **Run Now** from **Task** menu

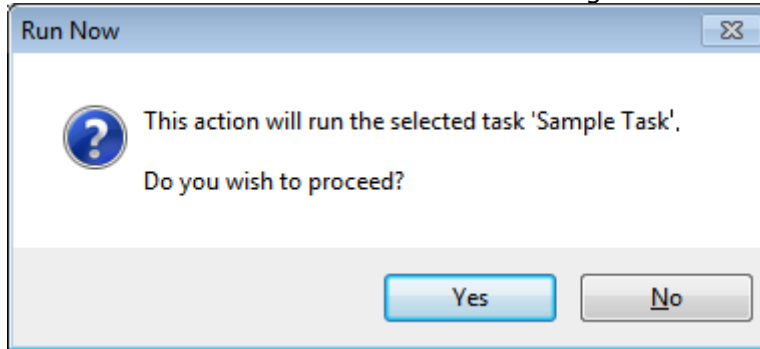


**Or Press Ctrl+R Key**

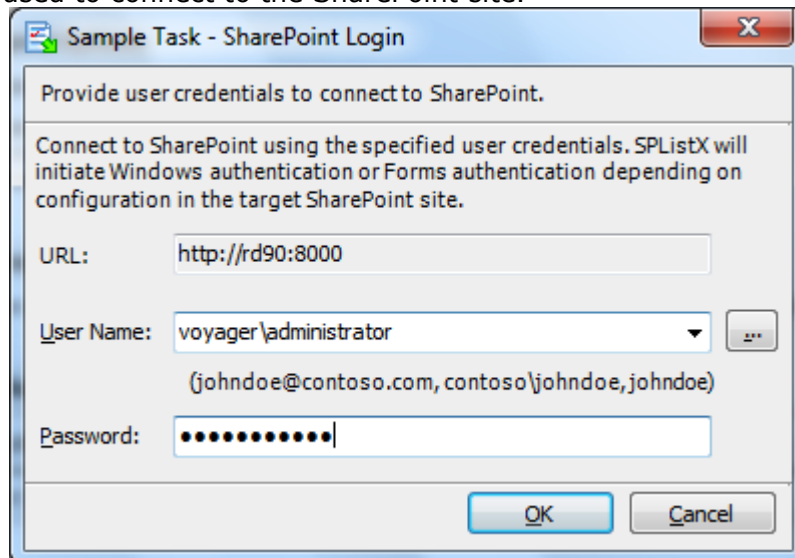


## Chapter-2-SPListX Features

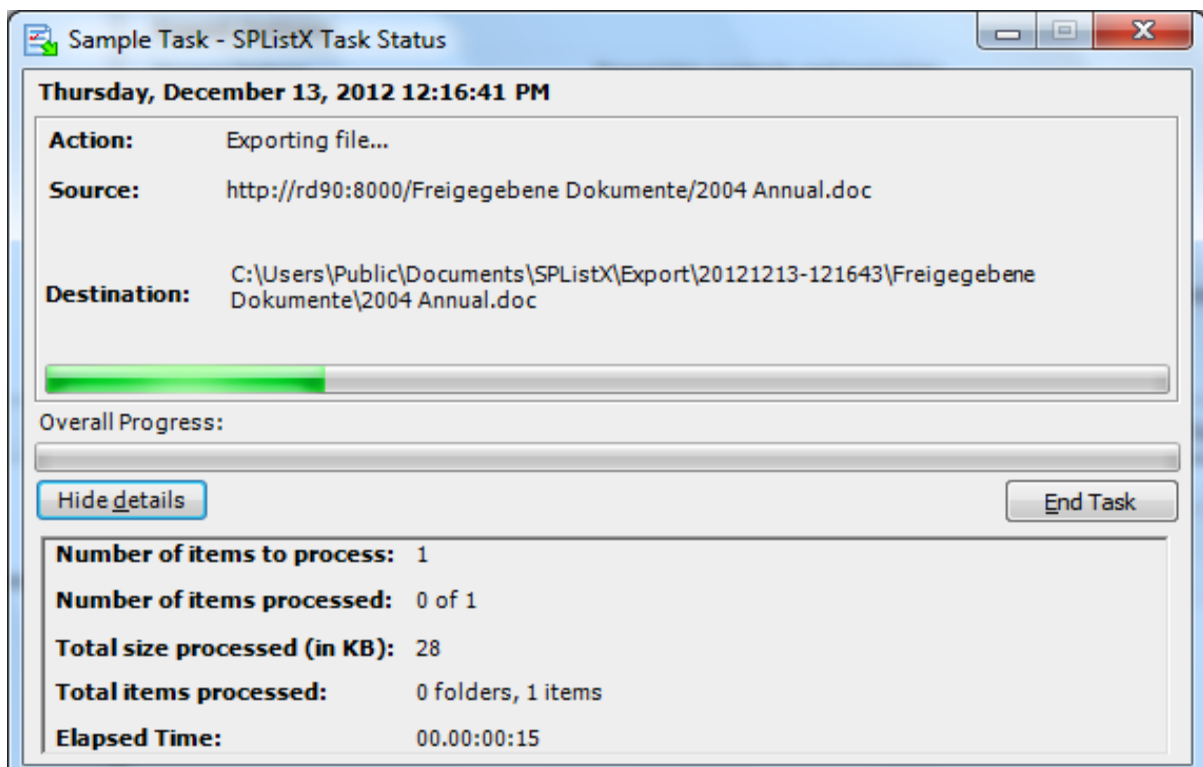
- 3) Click **Yes** in **Run Now** confirmation message box as shown below:



- 4) The **Credential Dialog** will appear as shown below. The given credential will be used to connect to the SharePoint site.



- 5) The current process of task will be reported in a new dialog as shown below:



### Runtime Statistics:

- a) **Number of items to process** - Shows the total number of line items to process in the current export task. This represents the number of items selected by the user in the browse mode or number of line items to process in the batch file.
  - b) **Number of items processed** - Shows the number of line items that have been processed at any given instance.
  - c) **Total size processed (in KB)** - Shows the total size of files that were exported from SharePoint at any given instance, including documents, version history, and file attachments.
  - d) **Total items processed** - Shows the number of folders and items (documents & list items) exported from SharePoint at any given time instance. The count does not include version histories and file attachments.
  - e) **Elapsed Time** - Shows the elapsed time from the instance the export task started or commenced.
- 6) Once the export task is complete, a new entry will be added in **Task History** section, where you can view the export activity performed when the task ran last.

### 2.8 Run a Task from Command Line

---

SPListX command line feature allows the user to instantiate a task from DOS command prompt anytime after an export task has been created using SPListX's task wizard.

To run a SPListX export task from command line:

#### 1) Usage:

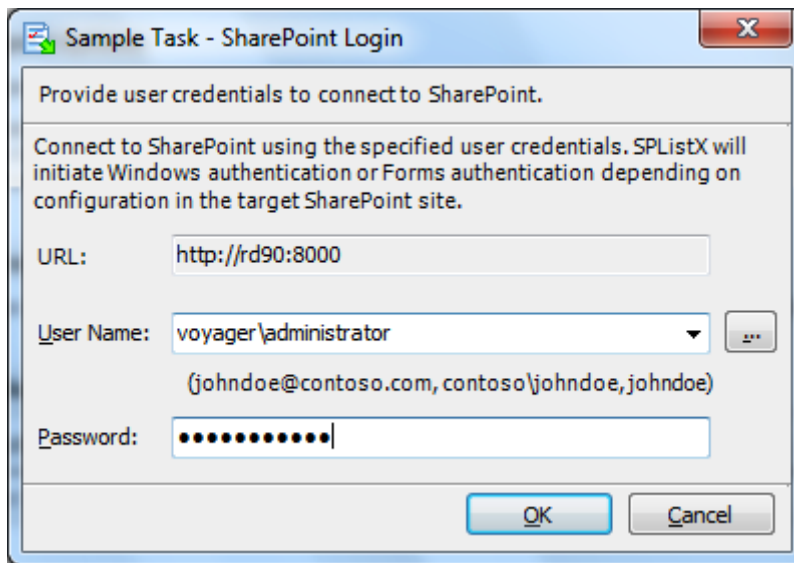
***SPListX TaskRunner <task name> [/profile: user name] [/u: user name]  
[/p: password] [/noprompt]***

Where,

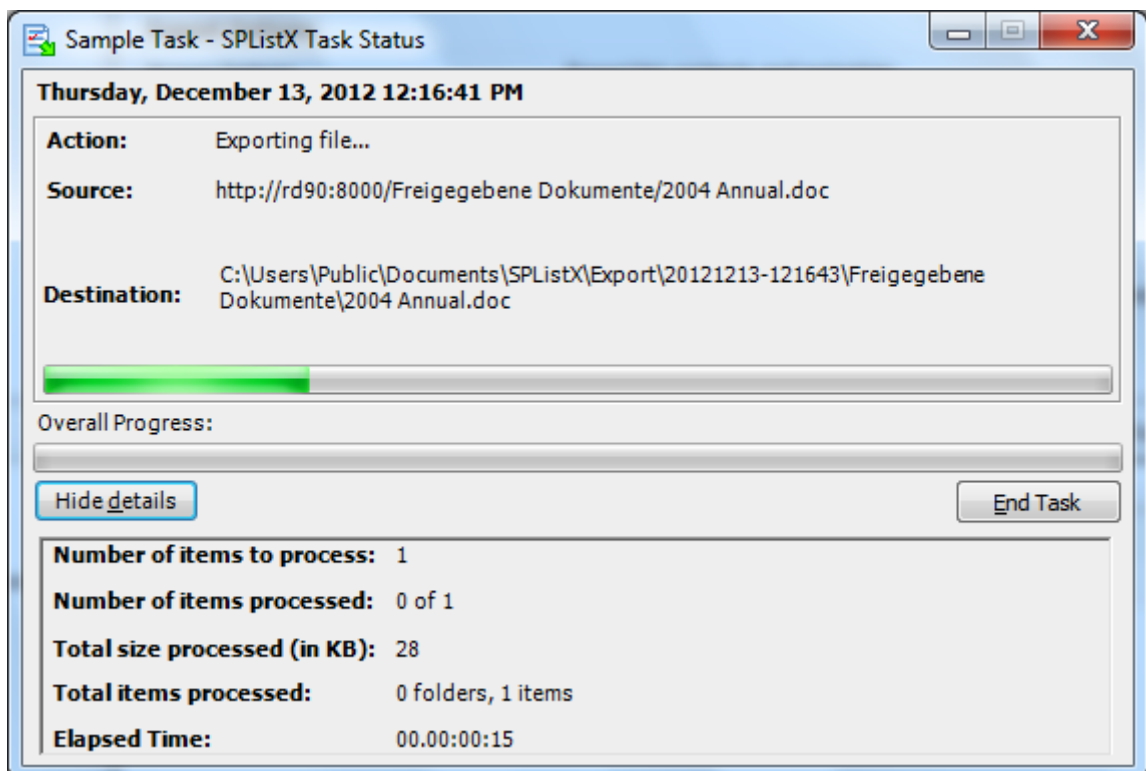
SPListX TaskRunner	Name of the SPListX Task Runner application, Specify absolute path where the SPListX TaskRunner located. For example: C:\Program Files\SPListX\SPListX TaskRunner
Task name:	Name of the SPListX Task to run from DOS command prompt, enclose the task name in double quotes. For example: "Sample Task1"
/Profile	Denotes profile name stored in the current user context using SPListX's Profile Manager, in which SPListX task must be run. Enclose the user name in double quotes. For example: "/profile: voyager \admin user" "/profile: Contoso\johndoe" "/profile:johndoe@contoso.com" "/profile: johndoe"
/u	Denotes user name context in which SPListX task must be run in the <i>domain\username</i> format. Enclose the user name in double quotes. For example: "/voyager\administrator" "/u: Contoso\johndoe" "/u:johndoe@contoso.com" "/johndoe"
/p	Denotes the password for the user name specified in /u parameter. Enclose the password in double quotes. For example: "/p: 2ab45fb"
/noprompt	This optional flag suppresses SPListX's login dialog prompt to enter user credentials to connect to SharePoint

## Chapter-2-SPListX Features

- 2) If **/noprompt** flag is not used, then the **Credential Dialog** will appear as shown below. The given credential will be used to connect to SharePoint.



- 3) The export task will be reported in a new dialog as shown below:



### Runtime Statistics:

- a) **Number of items to process** - Shows the total number of line items to process in the current export task. This represents the number of items selected by the user in the browse mode or number of line items to process in the batch file.

- b) Number of items processed** - Shows the number of line items that have been processed at any given instance.
  - c) Total size processed (in KB)** - Shows the total size of files that were exported from SharePoint at any given instance, including documents, version history, and file attachments.
  - d) Total items processed** - Shows the number of folders and items (documents & list items) exported from SharePoint at any given time instance. The count does not include version histories and file attachments.
  - e) Elapsed Time** - Shows the elapsed time from the instance the export task started or commenced.
- 4) Once the export task is complete, click **Refresh** button available in *Task History* pane in SPListX main application. A new entry will be added in **Task History** section, where you can view the export activity performed when the task ran last.

### Examples of invoking an export task from the command prompt:

```
C:\Program Files\SPListX> SPListXTaskRunner "mytask1" "/u: voyager\administrator"
"/p: 2az" /noprompt
```

```
C:\Program Files\SPListX>SPListXTaskRunner "Sample Task1" "/u:
voyager\adminuser" "/p: 2az$%&" /noprompt
```

```
C:\Program Files\SPListX> SPListXTaskRunner "Sample Task2" "/profile:
voyager\adminuser" /noprompt
```

```
D:\>"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task3" "/u:
voyager\adminuser" "/p: 2az$%&" /noprompt
```

```
D:\>"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task3" "/u:
voyager\adminuser" "/p: 2az$%&" /noprompt
```

- 5) For import tasks configured with SharePoint Online sites using Web Single Sign-on credential, only task name has to be provided as input as shown below. Other optional parameters except "/noprompt" are ignored for this authentication type.

```
C:\Program Files\SPListX> SPListXTaskRunner "Office 365 import" /noprompt
```

### 6) DOS batch file examples:

- To execute SPListX task one by one from a batch file:

```
"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task1"
"/u:johndoe@contoso.com" "/p: test" /noprompt
```

```
"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task2" "/u:
voyager\adminuser" "/p: 2az$%&" /noprompt
```

```
"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task3"
"/u:johndoe@contoso.com" "/p: test" /noprompt
```

```
"C:\Program Files\SPListX\SPListXTaskRunner" "Sample Task4"
"/profile:johndoe@contoso.com" /noprompt
```

- To execute multiple SPListX tasks simultaneously:

```
Start "cmd" "C:\Program Files\SPListX\SPListXTaskRunner" "Sample
Task1" "/u: voyager\user1" "/p: ctest1" /noprompt
```

```
Start "cmd" "C:\Program Files\SPListX\SPListXTaskRunner" "Sample
Task2" "/u: voyager\user2" "/p: ctest2" /noprompt
```

### 2.9 Create Windows Task

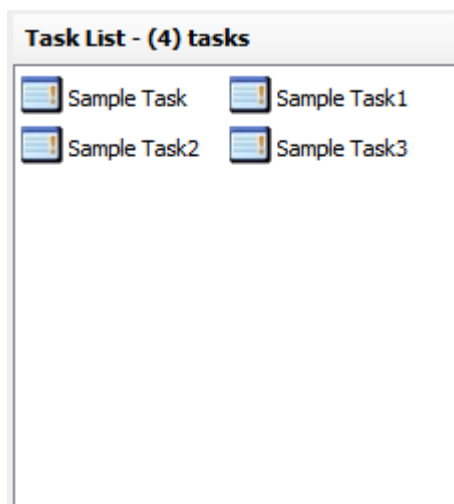
---

Use this tool to create a Windows Task in Windows Task Scheduler interface to automatically run the export tasks at scheduled intervals.

This tool helps you to re-create the Windows Schedule Task in the following two scenarios:

- To create Windows Schedule Task that was accidentally deleted and is required to be created again with the same schedule settings
- To create Windows Schedule Task when the SPListX export tasks are migrated from an old machine to a new machine

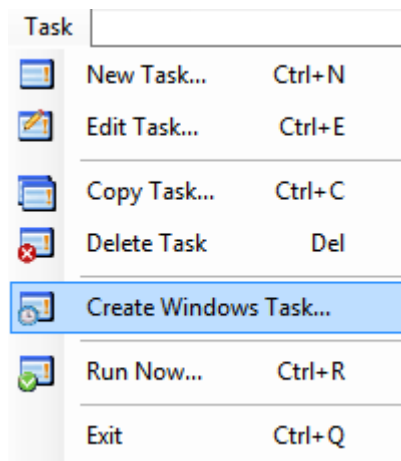
**1)** Select a task from the **Task List** pane



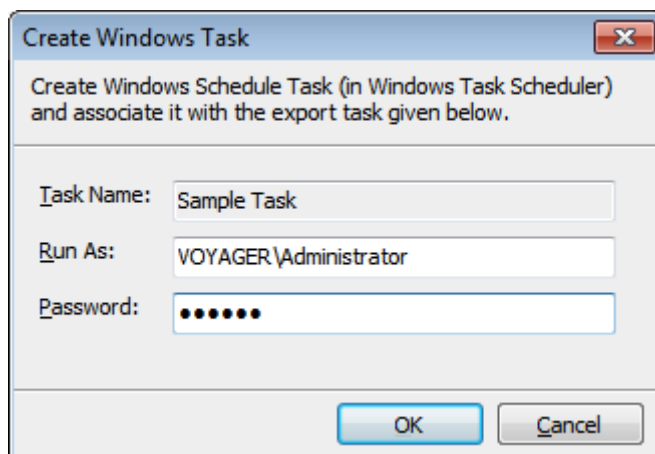
**2)** If SPListX has enough information about the required Windows Schedule Task, the **Create Windows Task** option will be enabled.

## Chapter-2-SPListX Features

Select **Create Windows Task** from **Task** menu



- 3) In **Create Windows Task** dialog, specify a **Run As** account and **Password** and Click **OK** to create a new schedule task with the same schedule settings that was previously saved by SPListX Export Task Wizard.



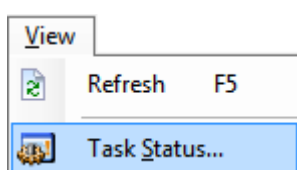
### 2.10 Task Status

To view and manage task status of a selected task:

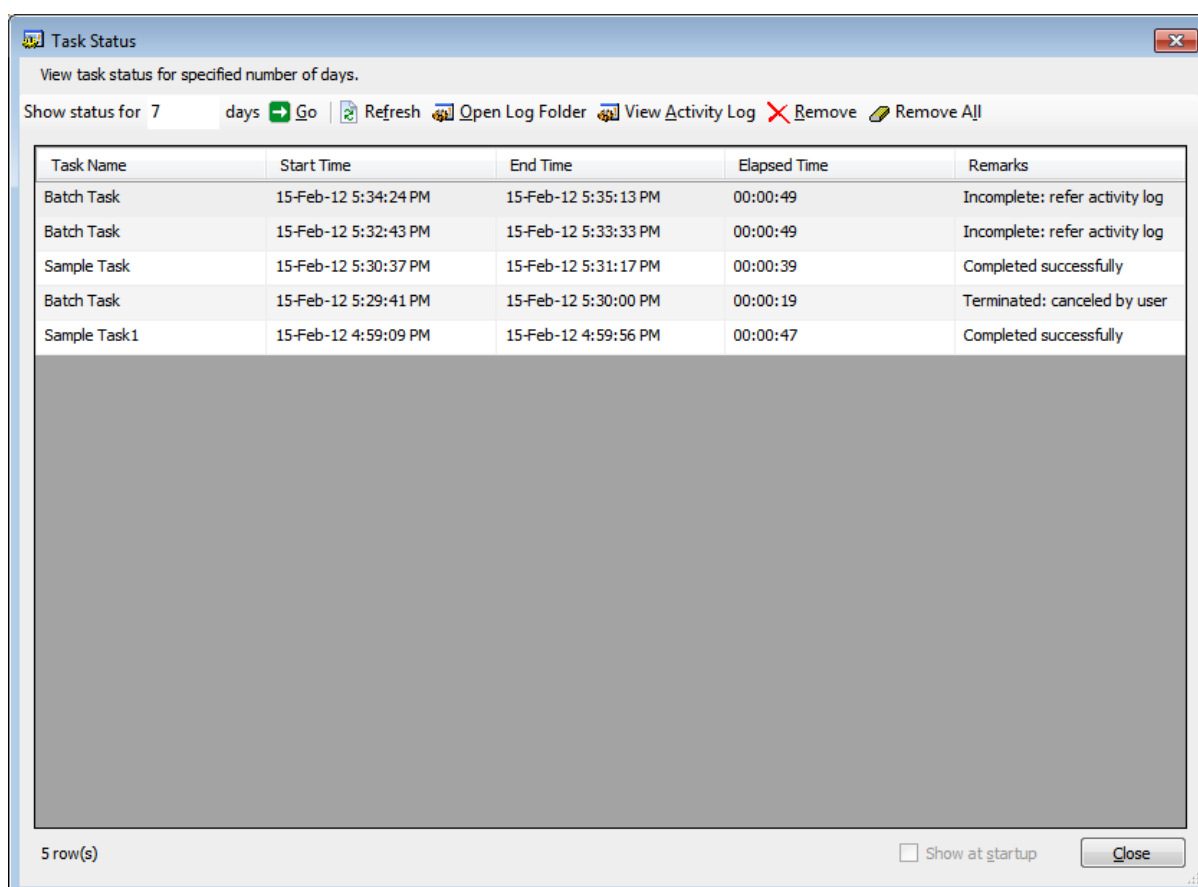
- 1) Click **Task Status** from *SPListX main screen*.



Or Select **Task Status** from **Tools** menu



- 2) The **Task Status** dialog appears as shown below:









## Chapter-2-SPListX Features

- 3) **Show status for <n> days:** Upon clicking **Go** button, displays task history entries of all tasks that were run within the specified number of days.
- 4) **Refresh:** Reloads the task history entries and updates the newly run tasks (if any).
- 5) **View activity log:** Displays activity log of the currently selected task history item.
- 6) **Remove:** Removes the currently selected task history entry and its associated log folders and files.
- 7) **Remove all:** Removes all task history entries and their associated log folders and files that are currently displayed.
- 8) Click **Close** button to close this window.

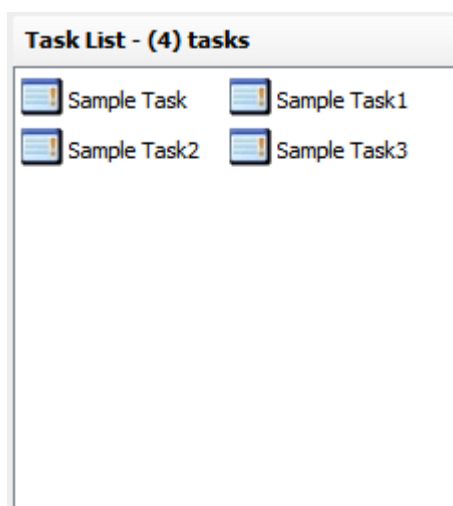
### 2.11 Task History

When an export task is run in SPListX, the task export information is maintained in the 'TaskHistory' folder. The task history information can be seen at right-bottom of SPListX application's main window.





Task History			
 Refresh  Open Log Folder  View Activity Log  Remove			
Start Time	End Time	Elapsed Time	Remarks
09-Jan-12 11:08:07 AM	09-Jan-12 11:08:44 AM	00:00:36	Completed successfully
09-Jan-12 11:06:42 AM	09-Jan-12 11:06:56 AM	00:00:14	Incomplete: refer activity log
05-Jan-12 3:08:56 PM	05-Jan-12 3:09:54 PM	00:00:57	Completed successfully

To view task history of a particular task:

- 1) Select a task from **Task List** pane.



- 2) The history of task will be displayed at right-bottom of SPListX main window as shown below:

Task History			
 Refresh  Open Log Folder  View Activity Log  Remove			
Start Time	End Time	Elapsed Time	Remarks
09-Jan-12 11:08:07 AM	09-Jan-12 11:08:44 AM	00:00:36	Completed successfully
09-Jan-12 11:06:42 AM	09-Jan-12 11:06:56 AM	00:00:14	Incomplete: refer activity log
05-Jan-12 3:08:56 PM	05-Jan-12 3:09:54 PM	00:00:57	Completed successfully

#### Where

Start Time -> Date and Time a task was initiated.

End Time -> Date and Time a task completed its export process

Elapsed Time -> Total time (hh:mm:ss) a task has taken to complete its export process.

Remarks -> Brief remark about the status of export.

## Chapter-2-SPListX Features

Possible Remarks	Description
Completed Successfully	Export process was completed successfully without any errors
Incomplete: refer activity log	Export process encountered certain errors as described in the activity log
Incomplete: Eval limit reached	Export process reached the maximum allowed number of files to export in evaluation / trial version. This message is applicable for evaluation / trial version only.
Terminated: Cancelled by User	Export Process was cancelled by the User.
Terminated abnormally	The Export Process was abnormally terminated or killed.
Failed: the following error occurred while creating activity log.	The export process could not be initiated as there were issues in creating the activity log files and initiating the export process.

The following operations can be performed on Task history items:

- **View activity log**
- **Remove a task history item**
- **Manage task status**
- **Cleanup history**

### 2.12 Profile Manager

---

Use this tool to create a user profile in **Windows Stored User Names and Passwords** applet / **Credential Manager**, in order to specify the user context to run SPListX export tasks. The stored user profile will be very useful when you are trying to perform the following export tasks in scheduled manner using SPListX:

- Exporting contents between two different Windows Domain Forest
- Exporting contents from SharePoint residing in completely disconnected / untrusted Windows Domain
- Exporting contents using Laptop / PC that is not part of the SharePoint domain
- Exporting contents using Forms Based Authentication (FBA)

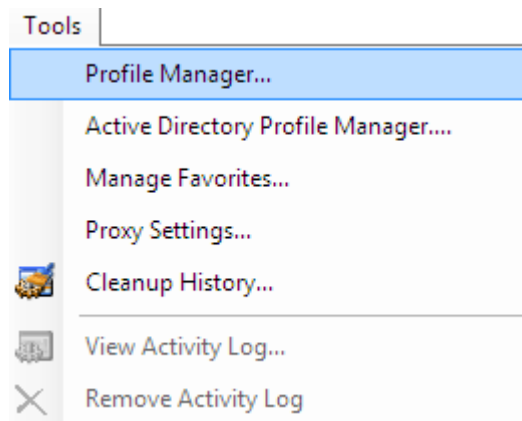
The stored user profile persists for all subsequent logon sessions on the same computer where SPListX is installed. The stored user profiles are visible to other logon sessions on the same computer.

The stored user profile created by using SPListX Profile Manager is restricted to the Windows user profile context used to create the stored user profile. If the Windows User Profile is maintained locally, SPListX stored user profile is accessible only by the same user in the same computer. If the user, who creates SPListX stored user profile, has a Roaming user account in the enterprise, the SPListX stored user profile can be accessed by the same user in any computer in the Windows enterprise.

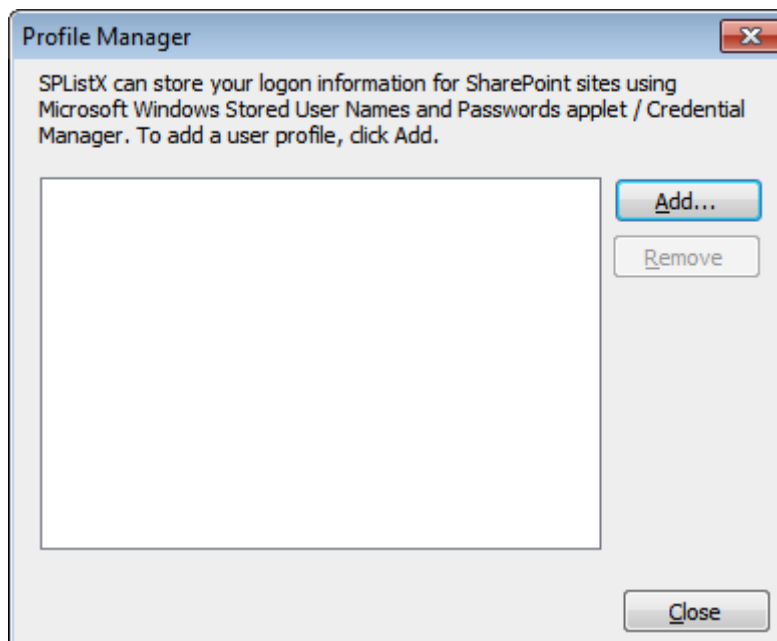
The stored user profile is a generic credential of **Windows Stored User Names and Passwords** applet / **Credential Manager** and can be used by SPListX application only. The credential information is stored securely in a *256 bit encrypted format* in **Windows Stored User Names and Passwords applet / Credential Manager**.

## Chapter-2-SPListX Features

- 1) In order to create a SPListX stored user profile, select **Profile Manager** from **Tools** menu.



- 2) The **Profile Manager** dialog will be shown as below:



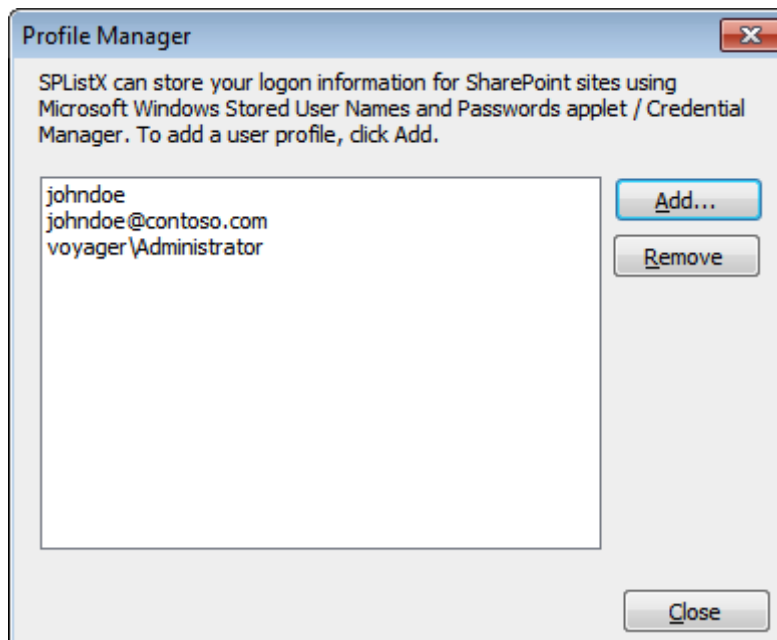
- 3) In order to add user profile, click **Add** button and provide user information in the **New User Profile** as shown below:

## Chapter-2-SPListX Features



Click **OK**

- 4) The newly added user profile will be shown in the **Profile Manager** as below:



Henceforth, the stored user profile can be used as credential input in SPListX application in order to connect to the SharePoint environment.

- 5) Click **Close** button to close the **Profile Manager** dialog.

### **Additional References:**

#### **Behavior of stored user names and passwords**

<http://support.microsoft.com/kb/281660>

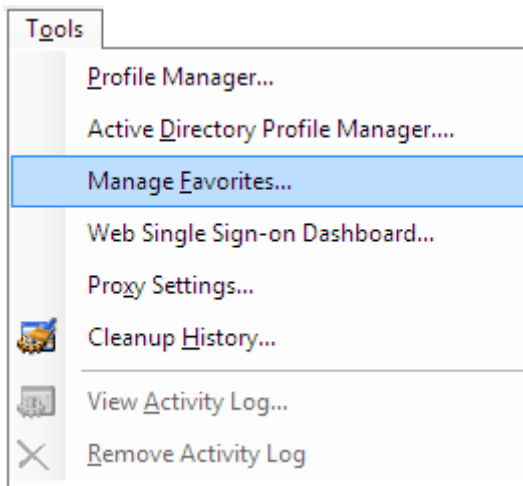
#### **Stored User Name and Password Best practices**

[http://technet.microsoft.com/en-us/library/cc784749 \(WS.10\).aspx](http://technet.microsoft.com/en-us/library/cc784749 (WS.10).aspx)

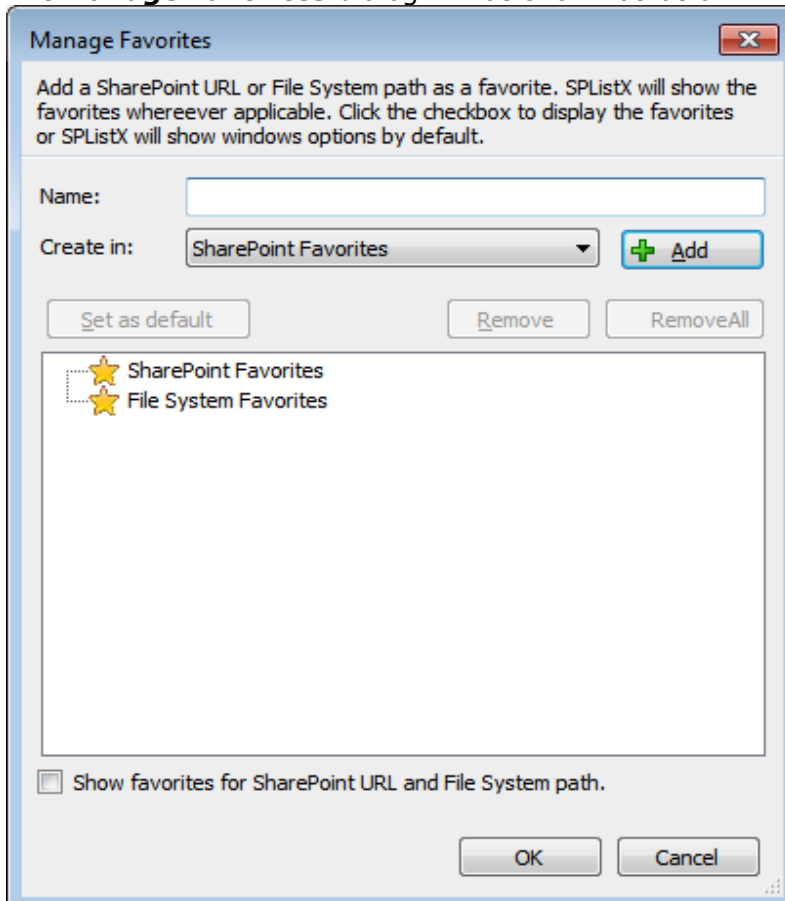
### 2.13 Manage Favorites

Use this tool to add frequently used SharePoint URL and File System path as favorites. Once added to favorites list, SPListX will show the relevant entries in the favorites as a dropdown wherever applicable. You can also set a particular URL and Path as a default favourite to select the entry by default in the appropriate steps.

- 1) In order to create SPListX favorites, select **Manage Favorites** from **Tools** menu.

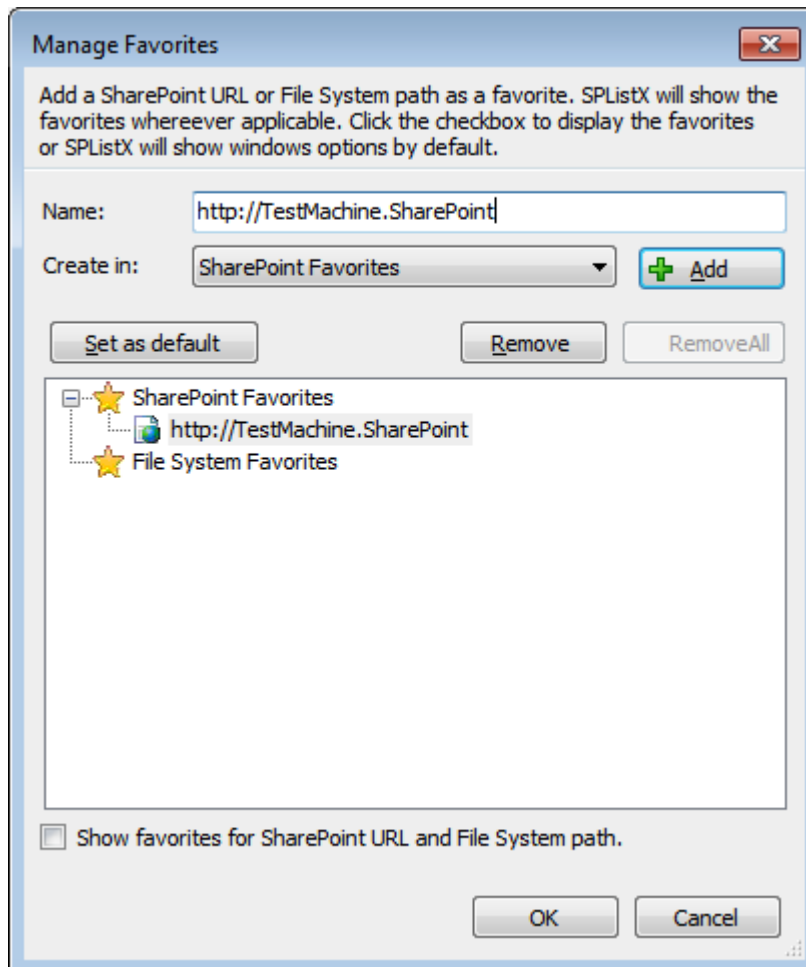


- 2) The **Manage Favorites** dialog will be shown as below:



## Chapter-2-SPListX Features

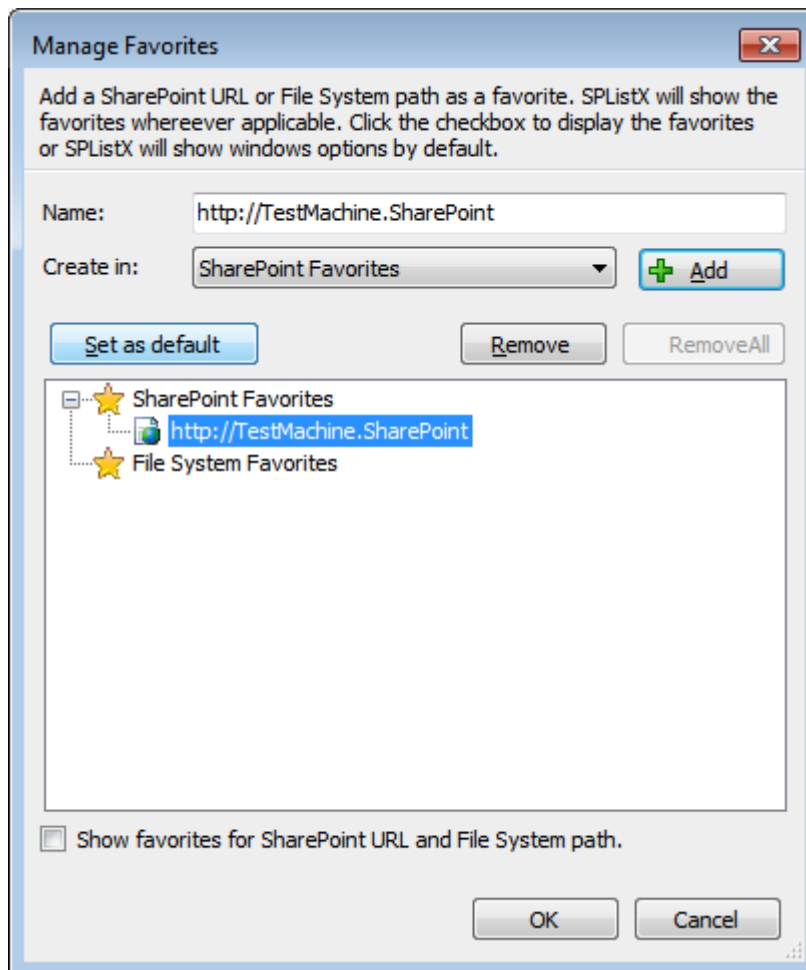
- 3) In order to add a favourite, select a favourite Type (i.e. SharePoint Favourite or File System Favorite) and click **Add** button to add the new favourite to the favourite list as shown below:





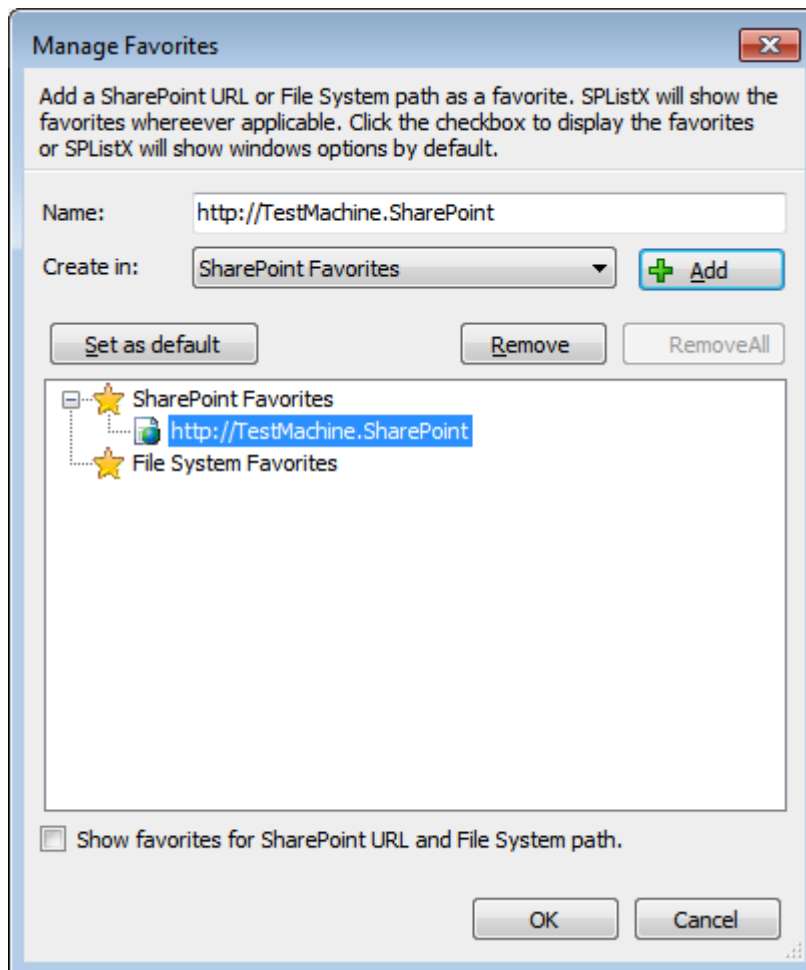
## Chapter-2-SPListX Features

- 4) In order to set **Default favorite**, select a favorite and Click **Set as default** button to set the default favorite. The Default favorite will be highlighted in Bold.



## Chapter-2-SPListX Features

- 5) To enable the favorites, you have to check the **Show favorites for SharePoint URL and File System path** option and *Click **OK*** button to enable the feature.



Henceforth, **Manage Favorites** will show the favorites as a dropdown, wherever applicable.

### 2.14 Active Directory Profile Manager

---

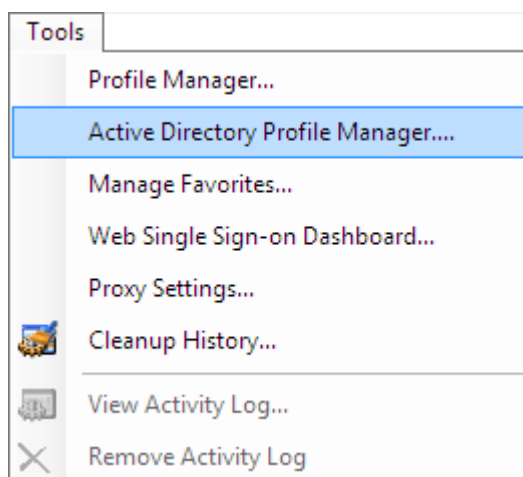
Use this tool to create an Active Directory user profile to retrieve the Domain Group members from SharePoint environment. This user profile is stored in **Windows Stored User Names and Passwords / Credential Manager**. Specify a domain user credential to connect. It is recommended to use **Administrator Credential** to retrieve the members list from the Domain Group.

SPListX stores the active directory user profile in the local computer and will be accessible only by the user who creates the user profile. If the user who creates the active directory user profile has a Roaming user account in the enterprise, the stored user profile can be accessed in any computer in the Windows enterprise.

The stored active directory user profile can be used by SPListX application only. The credential information is stored securely in **256 bit encrypted format** in **Windows Stored User Names and Passwords / Credential Manager**.

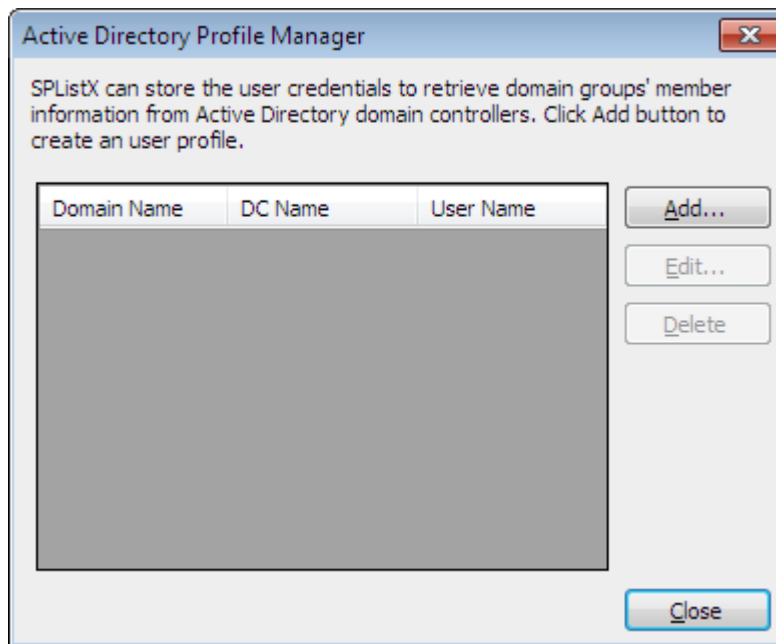
For scheduled tasks, SPListX will use this stored user credential to retrieve Domain Group members from Active Directory.

- 1) Select **Active Directory Profile Manager** from **Tools** menu.

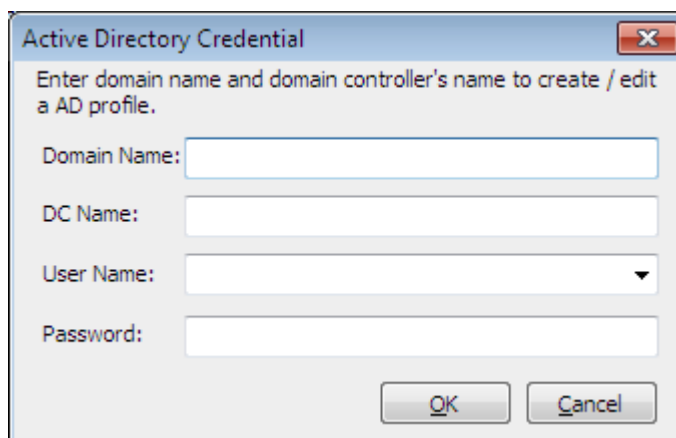


## Chapter-2-SPListX Features

2) The **Active Directory Profile Manager** *dialog* will be shown as below:



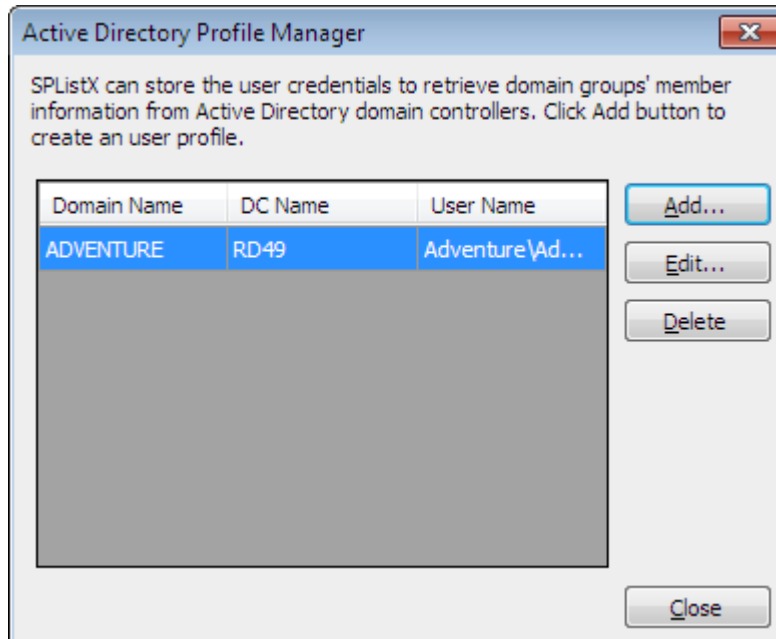
3) In order to add user profile, click **Add** button and provide user information in the **New Active Directory Profile** as shown below:



- a) **Domain Name:** Specify the domain name associated with the SharePoint farm to retrieve the members.
- b) **DC Name:** Specify DC (Domain Controller) Name to connect with the domain to retrieve the group members.
- c) Specify a new user profile or select an existing user profile to connect with domain to export members for the domain groups referenced in SharePoint server.

## Chapter-2-SPListX Features

- 4) The newly added user profile will be shown in the **Active Directory Profile Manager** as below:



Henceforth, the stored credential can be used to export Domain Group members from the SharePoint server.

- 5) Click **Close** button to close the **Active Directory Profile Manager** dialog.

### Additional References:

#### Behavior of stored user names and passwords

<http://support.microsoft.com/kb/281660>

#### Stored User Name and Password Best practices

[http://technet.microsoft.com/en-us/library/cc784749\(WS.10\).aspx](http://technet.microsoft.com/en-us/library/cc784749(WS.10).aspx)

### 2.15 File Share Manager

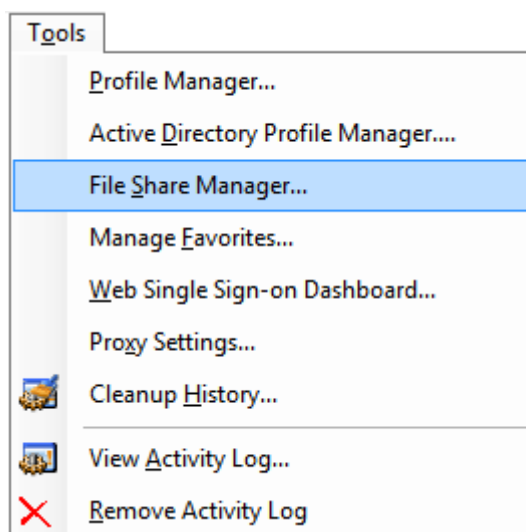
---

Use this tool to create a file share user profile to retrieve the contents from File Shares, which are added in the search content source. These user credentials are used to access the file share source, which are added in the search crawl index and to export the file share contents to the target location. These user profiles are stored securely in **Windows Stored User Names and Passwords / Credential Manager**.

SPListX stores the file share user profile in the local computer and will be accessible only by the user who creates the user profile. If the user who creates the file share user profile has a Roaming user account in the enterprise, the stored user profile can be accessed in any computer in the Windows enterprise

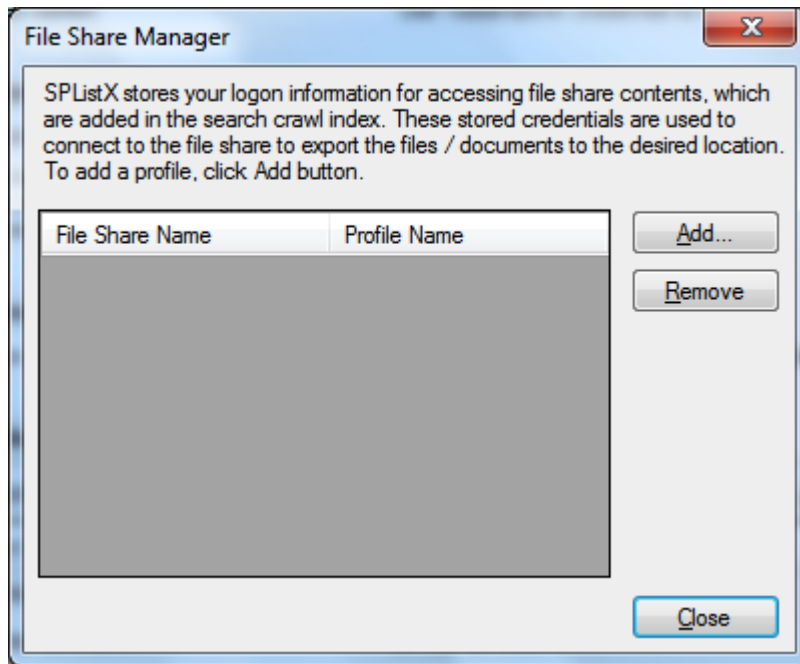
The stored file share user profile can be used by SPListX application only. The credential information is stored securely in *256 bit encrypted format* in **Windows Stored User Names and Passwords / Credential Manager**.

- 1) Select **File Share Manager** from **Tools** menu.

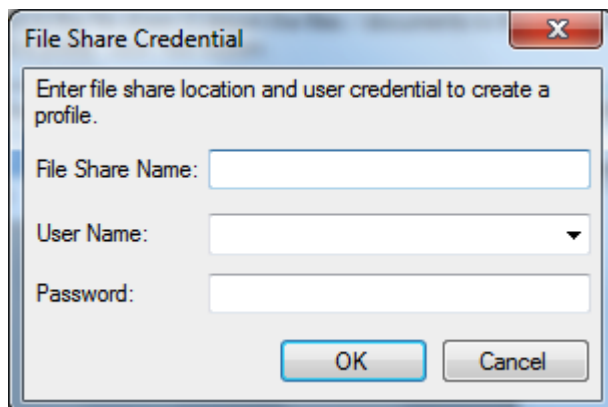


- 2) The **File Share Manager** dialog will be shown as below:

## Chapter-2-SPListX Features

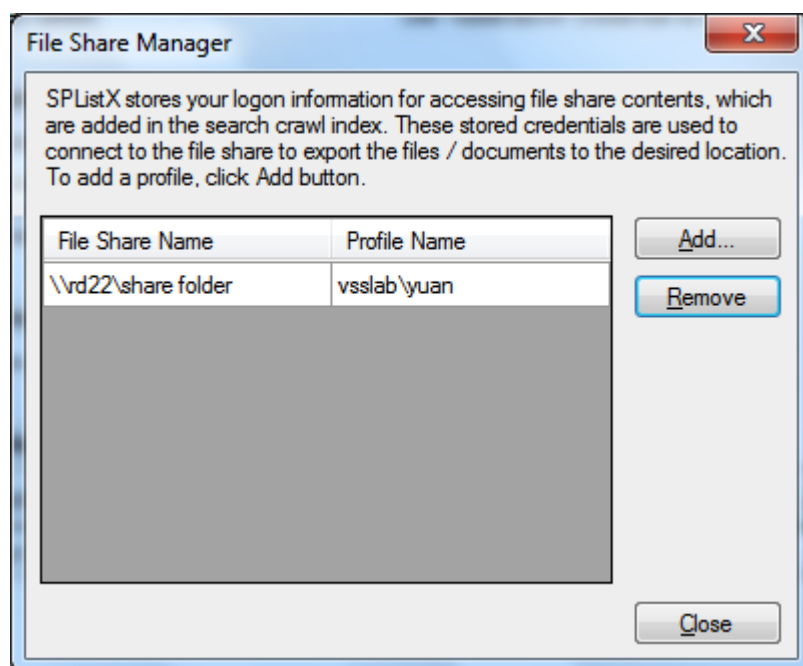


- 3) In order to add user profile, click **Add** button and provide user information in the **File Share Credential** as shown below:



- a) **File Share Name:** Specify the file share server name, where the files are stored and the file share index is added in the search crawl index.
- b) Specify a new user profile or select an existing user profile to connect to file share to export file share contents which are added in the SharePoint search crawl index.
- 4) The newly added user profile will be shown in the **File Share Manager** as below:

## Chapter-2-SPListX Features



Henceforth, the stored credential can be used to export the file share contents, which are added in the search crawl index in the SharePoint server.

- 5) Click **Close** button to close the **File Share Manager** dialog.

### **Additional References:**

#### **Behavior of stored user names and passwords**

<http://support.microsoft.com/kb/281660>

#### **Stored User Name and Password Best practices**

[http://technet.microsoft.com/en-us/library/cc784749\(Ws.10\).aspx](http://technet.microsoft.com/en-us/library/cc784749(Ws.10).aspx)







### 2.16 Remove a task history item

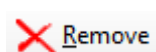
---

To remove a task history item:

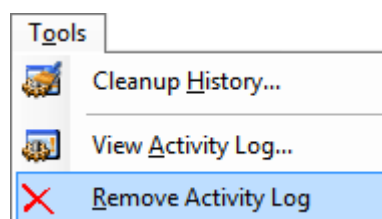
- 1) Select item from **Task History** pane.

Task History  Refresh  Open Log Folder  View Activity Log  Remove			
Start Time	End Time	Elapsed Time	Remarks
09-Jan-12 11:08:07 AM	09-Jan-12 11:08:44 AM	00:00:36	Completed successfully
09-Jan-12 11:06:42 AM	09-Jan-12 11:06:56 AM	00:00:14	Incomplete: refer activity log
05-Jan-12 3:08:56 PM	05-Jan-12 3:09:54 PM	00:00:57	Completed successfully

- 2) Click **Remove** from SPListX main screen.



Or Select **Remove Activity Log** from **Tools** menu



This will remove the currently selected activity log entry and log folders & files associated with the task history item. To maintain task history items, see Cleanup history and Task Status.

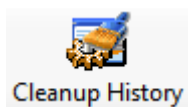
### 2.17 Cleanup History

---

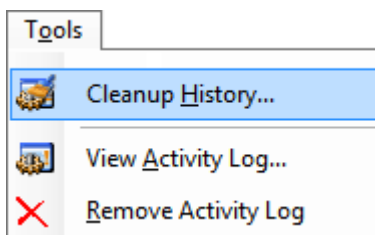
SPListX maintain the task history of each task run in the application task history folder e.g., **<Application Data Folder> \SPListX\TaskHistory\<task name>\<timestamp>**.

Over a period of time, the task history folder grows in size. We recommend cleaning up the task history periodically to control the disk space usage. To cleanup task history, perform the following steps given below:

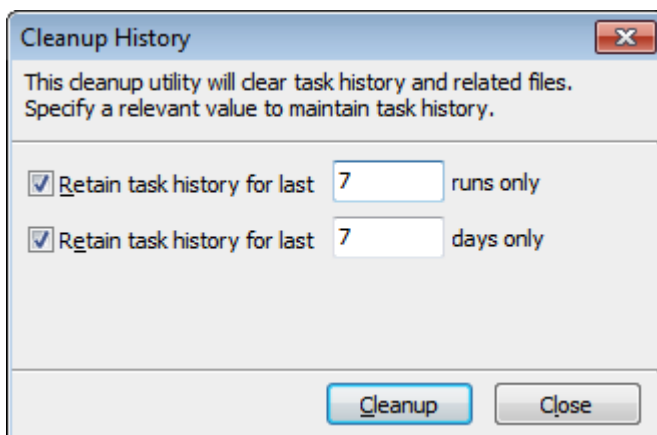
- 1) Click **Cleanup History** from SPListX Task Manager.



Or Select **Cleanup History** from **Tools** menu



- 2) The **Cleanup History** dialog appears as shown below:



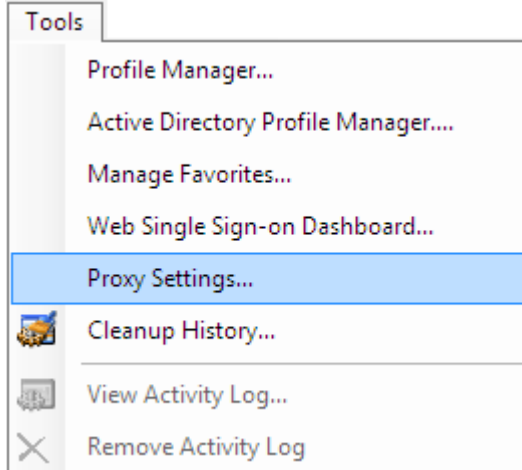
- a) Selecting **Retain task history for last <n> runs only** option will remove all history entries for each task that are older than <n> runs (task instances).
- b) Selecting **Retain task history for last <n> days only** option will remove all history entries for each task that are older than <n> days.

### 2.18 Proxy Server Settings

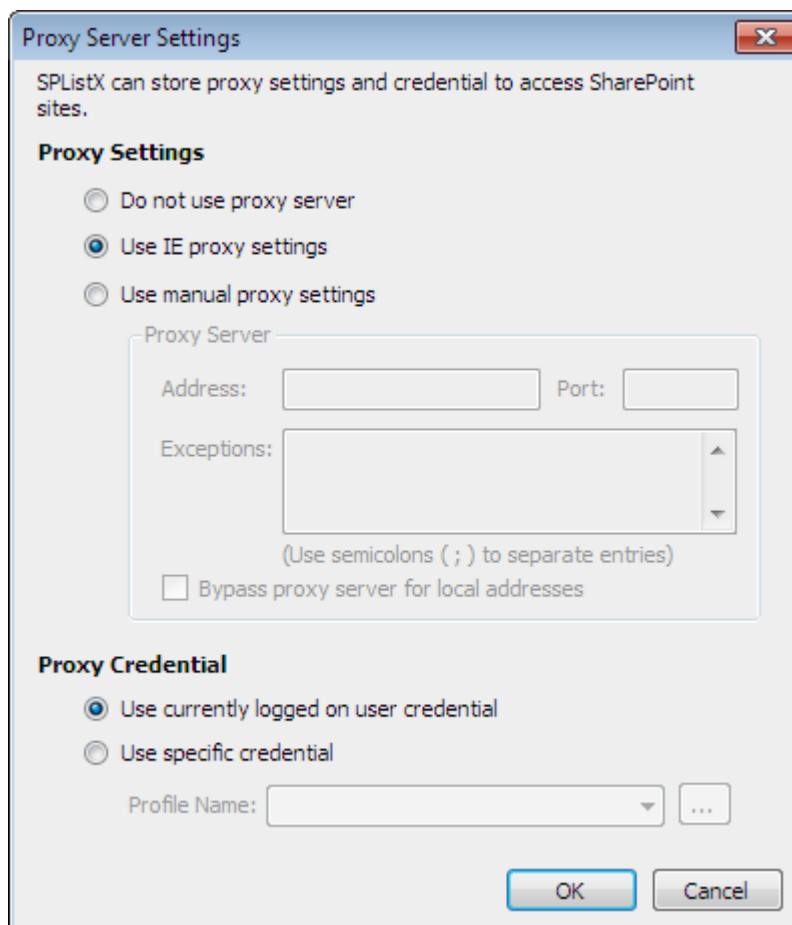
---

Use this tool to specify the Proxy Server settings to use if you wish to override Internet Explorer's proxy settings (set as default). You can specify a custom proxy and credential to create a connection with the SharePoint server. The proxy server settings will be used globally within SPListX application.

- 1) Select **Proxy Server Settings** from **Tools** menu.



- 2) The **Proxy Server Settings** dialog will be shown as below:



## Chapter-2-SPListX Features

### 3) Specify Proxy Server Settings to use:

- a) **Do not use proxy server** - This option will not use the proxy settings to connect to the SharePoint server.
- b) **Use IE proxy settings** - This option will use the Default Proxy Settings used by Internet Explorer (IE).
- c) **Use manual proxy settings** - The proxy server specified in this option will be used by SPListX to connect to the SharePoint server. Enter the Address, Port and Exceptions list as you do in Internet Explorer to specify the proxy settings.
- d) **Bypass proxy server for local address** -This option controls whether requests for resources on the LAN are sent to the proxy server or sent directly to the host where the resource resides.

Proxy Server Settings

SPListX can store proxy settings and credential to access SharePoint sites.

**Proxy Settings**

☐ Do not use proxy server

☐ Use IE proxy settings

☒ Use manual proxy settings

Proxy Server

Address: 10.10.10.10 Port: 8080

Exceptions: google

(Use semicolons ( ; ) to separate entries)

☒ Bypass proxy server for local addresses

**Proxy Credential**

☒ Use currently logged on user credential

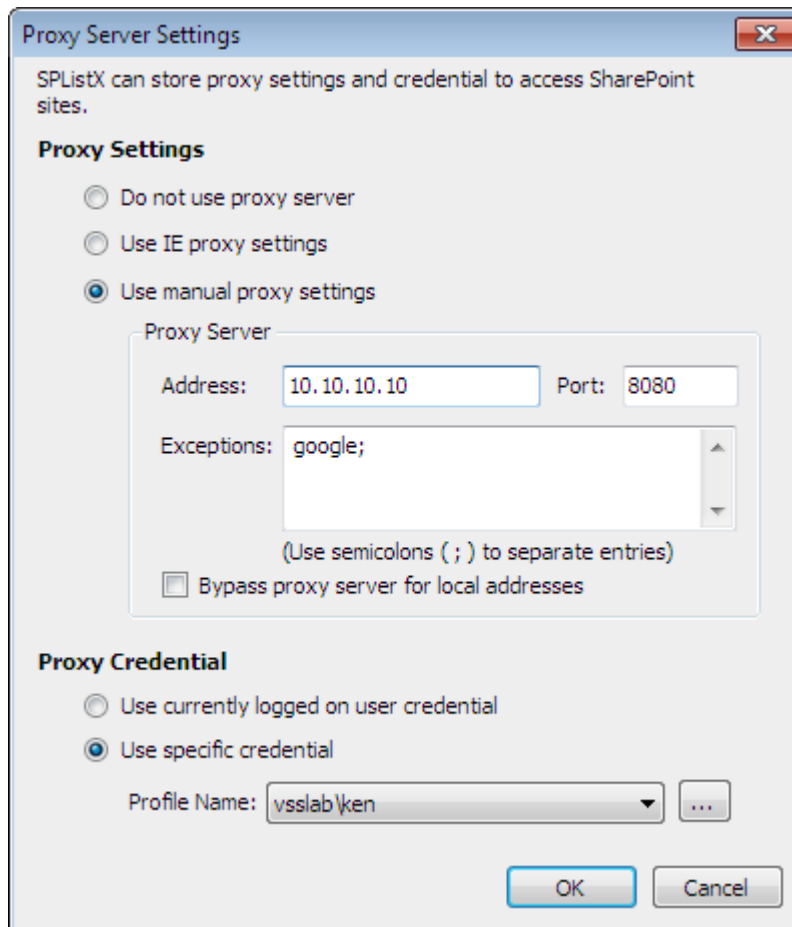
☐ Use specific credential


Profile Name: [dropdown] [button]

OK Cancel

## Chapter-2-SPListX Features

- 4) Select **Proxy Credential** to use when connecting to the proxy server and request authorization to connect to the SharePoint server:



- a) **Use currently logged on user credential** - This option will use the currently logged on user account to connect to the proxy server and request authorization to connect to the resource.
- b) **Use specific credential** - You can specify a different user credential, which is stored in Windows Credential Manager to connect to the proxy server and request authorization to connect to the resource. To add a new user profile, click  button.
- 5) Click **Close** button to close the **Proxy Server Settings** dialog.

### 2.19 Web Single Sign-on Dashboard

---

**Web Single Sign-on Dashboard** helps you verify the connectivity status for a claims-enabled SharePoint site. The persistent connection ensures that SPListX can execute the export task in unattended mode or scheduled mode using the already established connection for the SharePoint site. SPListX uses Web Single Sign-on framework to eliminate providing username and password to connect to SharePoint as long as the connection is already available for the site.

#### Shared Credential

A **Shared Credential** is nothing but a credential that can be accessed by any claim-aware applications such as *Internet Explorer*, *SPListX*, etc. The shared credential is a combination of user name and password stored / used in a secured manner within the current Windows user profile. You can create the shared credential by selecting **Keep me signed in** option in the login dialog. If the shared credential is already available in the current Windows user profile, Web Single Sign-on uses this credential to access the SharePoint site unless the cookie is deleted.

The **Shared Credential** will be very useful when you are trying to perform the following export tasks in scheduled manner using *SPListX*:

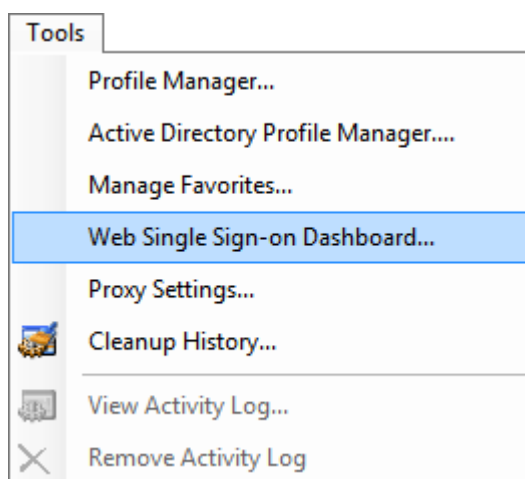
- Exporting contents using Federated Authentication / Claims Authentication
- Exporting contents from Office365 SharePoint Online that uses federated identify configured through ADFS

The shared credential persists for all subsequent logon sessions on the same computer where SPListX is installed unless the federation service treats it as expired or if the cookie is deleted from the computer.

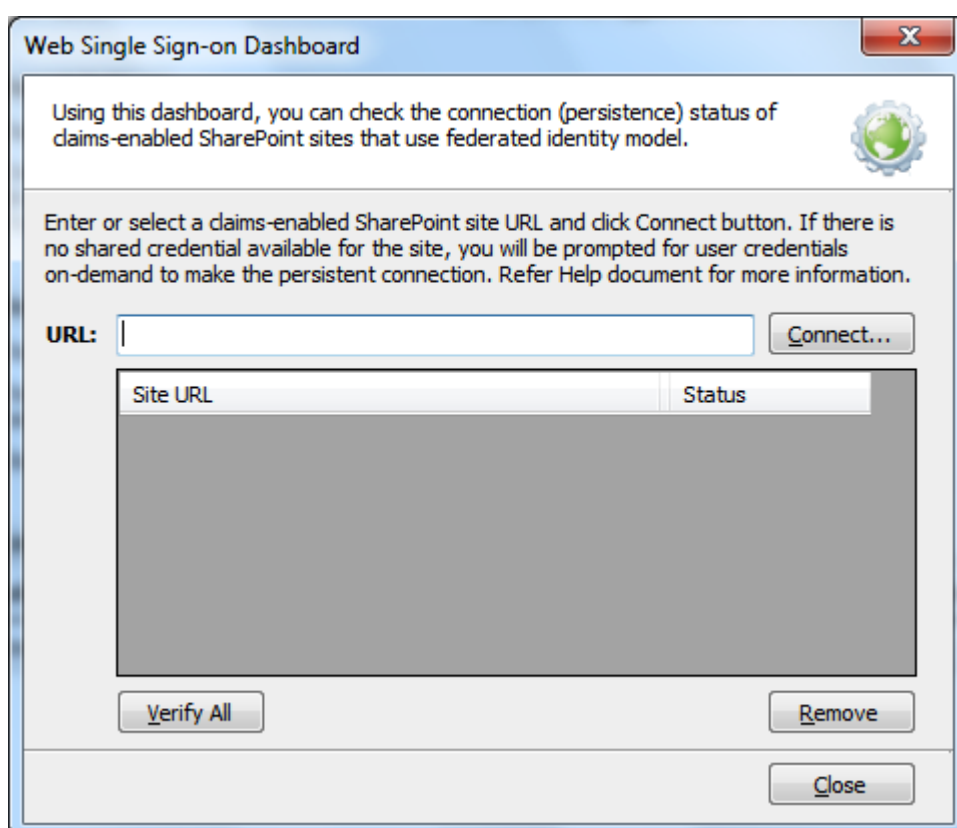
The shared credential by nature is restricted to the Windows user profile context only. The shared credential is accessible only by the same user in the same computer. The shared credential can be removed by deleting the cookies using Internet Explorer.

- 1) Launch **Web Single Sign-on Dashboard** tool using **Tools** menu.

## Chapter-2-SPListX Features

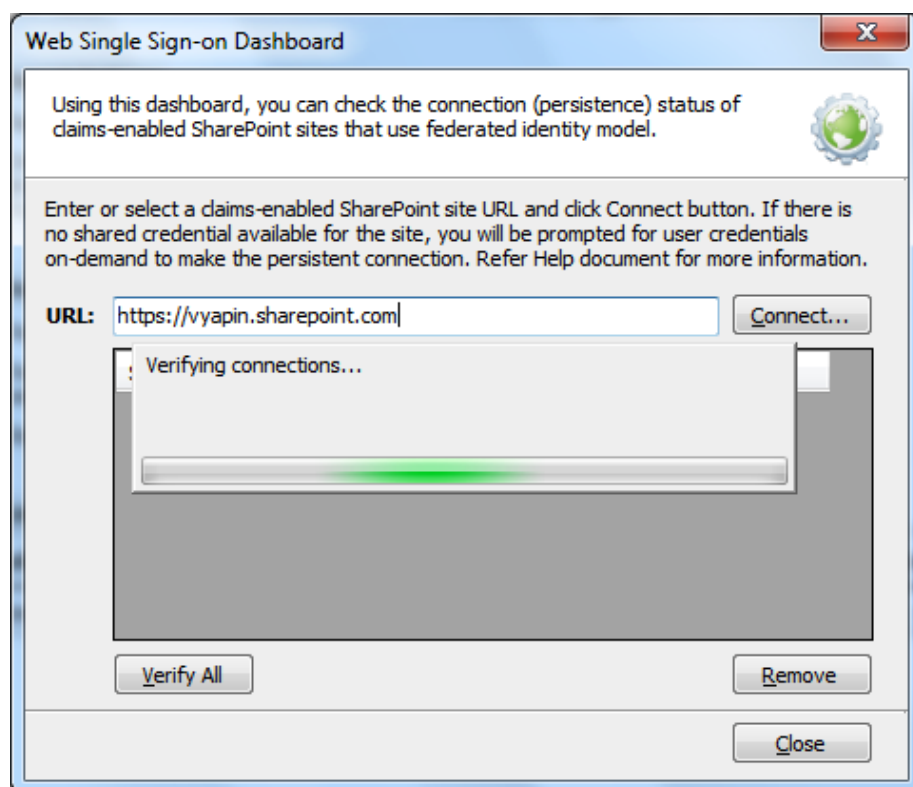


2) The **Web Single Sign-on Dashboard** dialog will be shown as below:

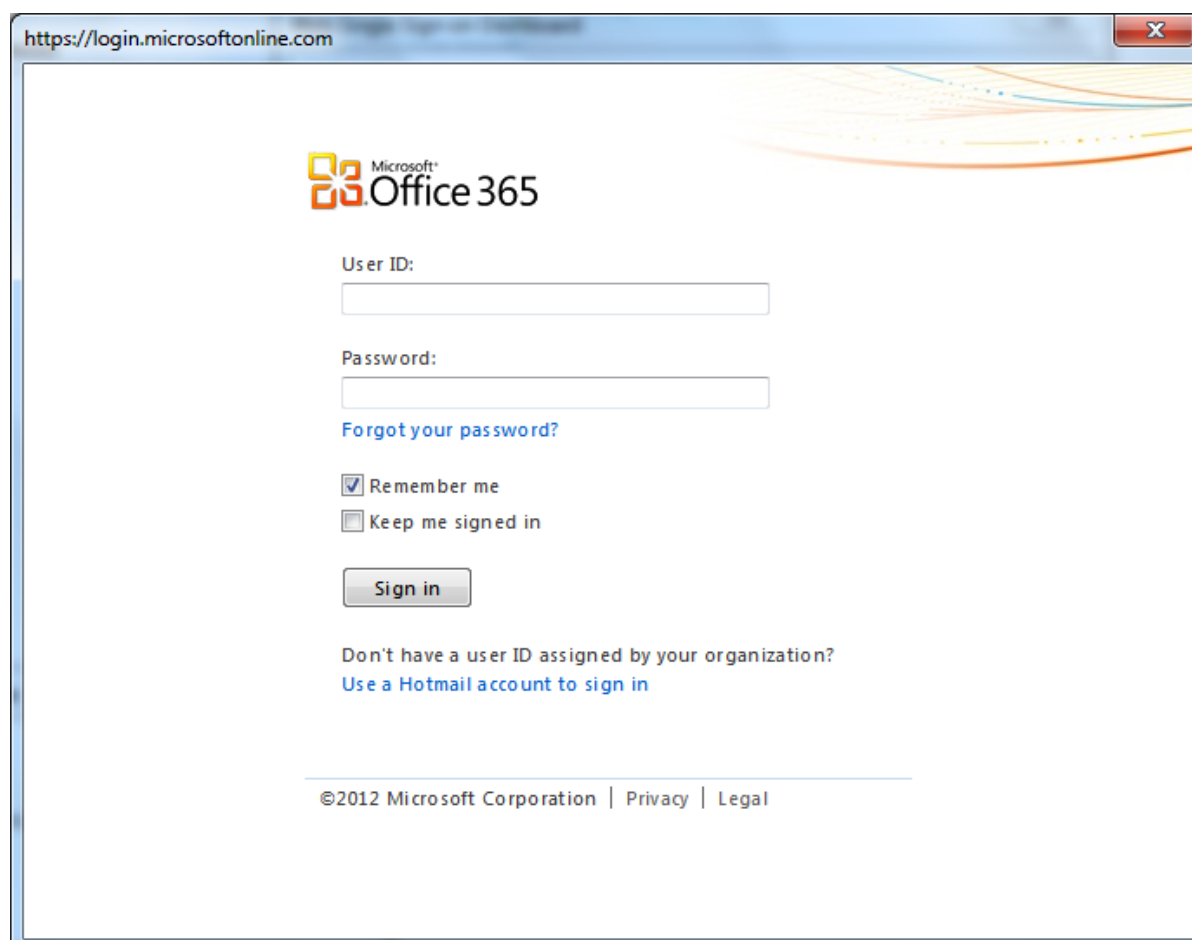


3) In order to verify the connectivity status of a site, provide the site **URL** in the text box and *click* **Connect** button to commence the authentication process.

## Chapter-2-SPListX Features



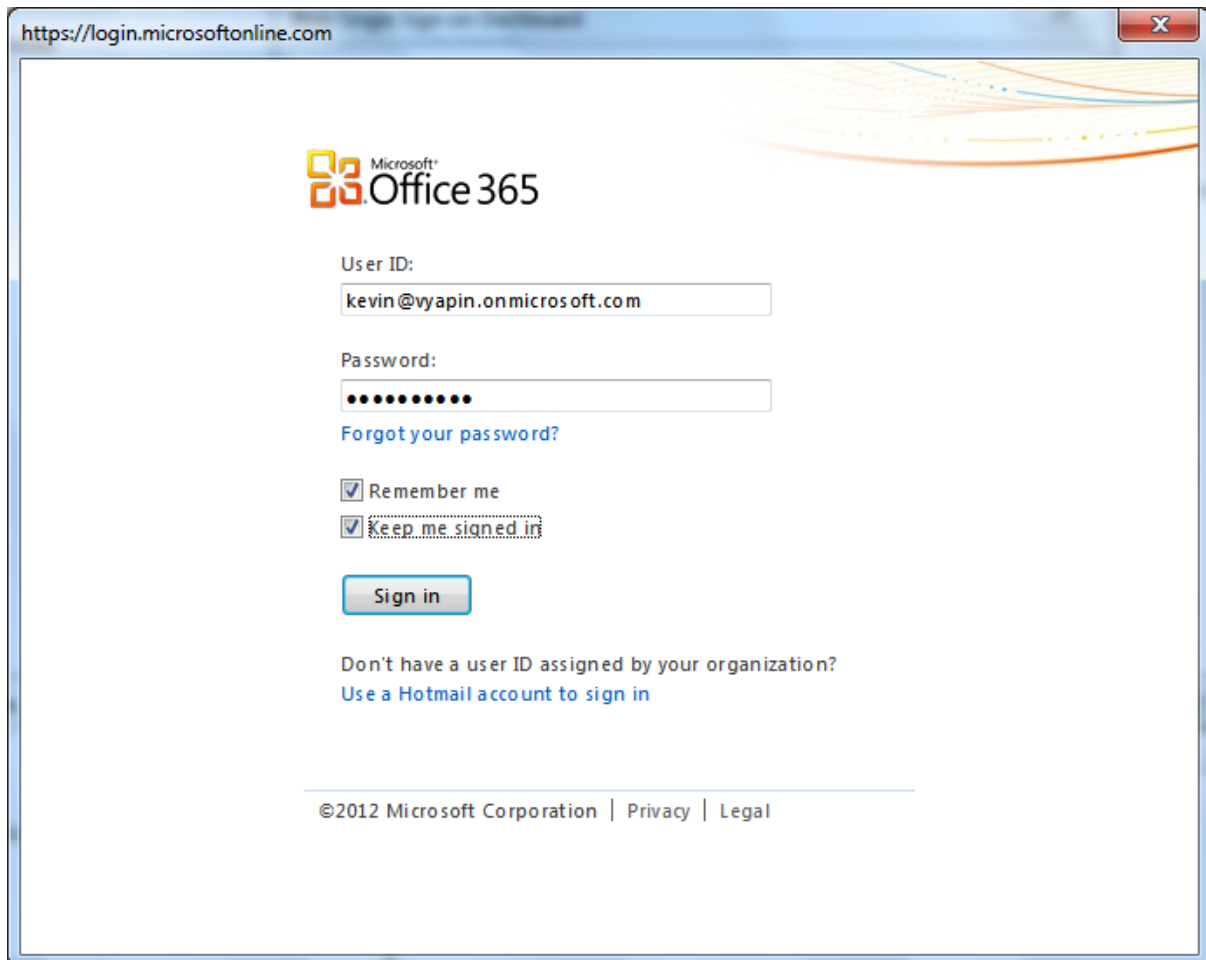
- 4) If there is no shared credential available for the SharePoint site, you will be prompted for user credentials automatically as shown below:





## Chapter-2-SPListX Features

- 5) Provide the user name and password in the respective text box. Select **keep me signed-in** option to create the shared credential and establish a persistent connection. Click **Sign-in**.



The screenshot shows the Microsoft Office 365 login interface in a web browser window. The address bar displays <https://login.microsoftonline.com>. The page features the Microsoft Office 365 logo at the top. Below the logo, there are two input fields: 'User ID:' containing 'kevin@vyapin.onmicrosoft.com' and 'Password:' with masked characters. A link for 'Forgot your password?' is positioned below the password field. Two checkboxes are present: 'Remember me' and 'Keep me signed in', both of which are checked. A 'Sign in' button is located below the checkboxes. At the bottom of the main content area, there is a link for users who do not have a user ID assigned by their organization: 'Use a Hotmail account to sign in'. The footer contains the copyright notice '©2012 Microsoft Corporation' and links to 'Privacy' and 'Legal' pages.

https://login.microsoftonline.com

Microsoft Office 365

User ID:  
kevin@vyapin.onmicrosoft.com

Password:  
●●●●●●●●

[Forgot your password?](#)

☒ Remember me  
☒ Keep me signed in

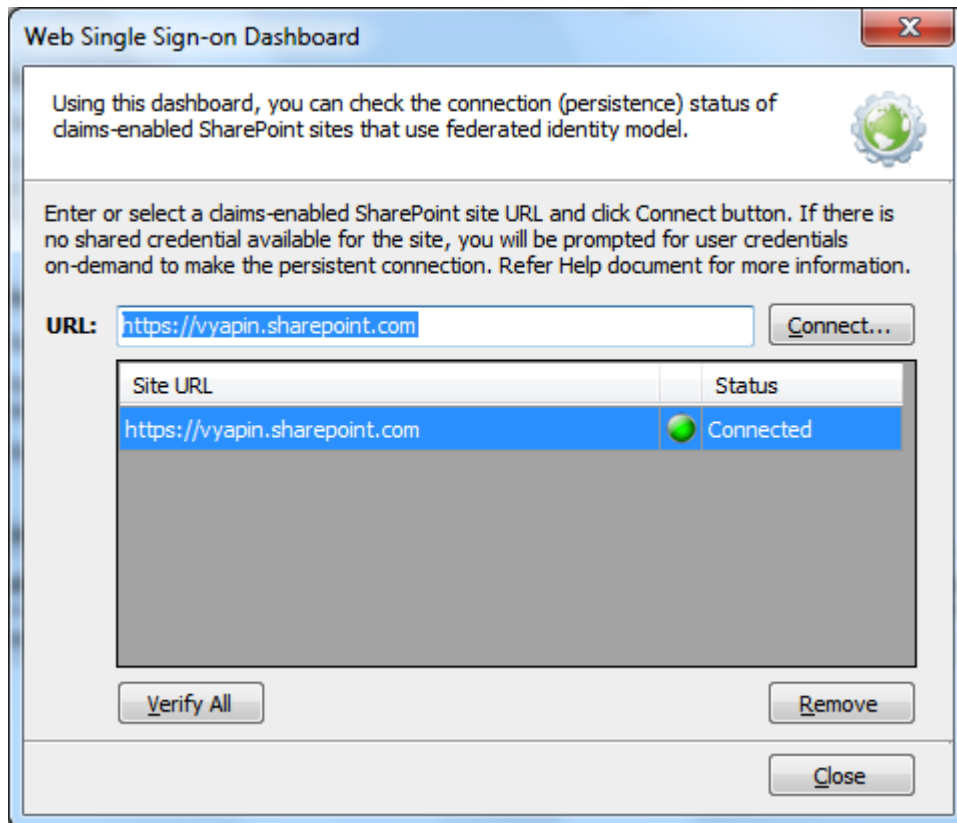
Sign in

Don't have a user ID assigned by your organization?  
[Use a Hotmail account to sign in](#)

©2012 Microsoft Corporation | [Privacy](#) | [Legal](#)

## Chapter-2-SPListX Features

- 6) Once the authentication process is finished, the connectivity status will be shown as below:



Henceforth, the shared credential can be used to connect to the federated SharePoint site by SPListX until the connectivity is closed or cookies are deleted.





- 7) Click **Close** button to close **Web Single Sign-on Dashboard** dialog.

### 2.20 View Activity Log

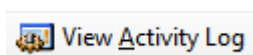
---

To **View Activity Log** associated with a task history item:

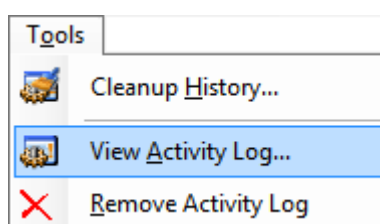
- 1) Select an item from **Task History** pane.

Task History			
 Refresh  Open Log Folder  View Activity Log  Remove			
Start Time	End Time	Elapsed Time	Remarks
09-Jan-12 11:08:07 AM	09-Jan-12 11:08:44 AM	00:00:36	Completed successfully
09-Jan-12 11:06:42 AM	09-Jan-12 11:06:56 AM	00:00:14	Incomplete: refer activity log
05-Jan-12 3:08:56 PM	05-Jan-12 3:09:54 PM	00:00:57	Completed successfully

- 2) Click **View Activity Log** from SPListX main screen.

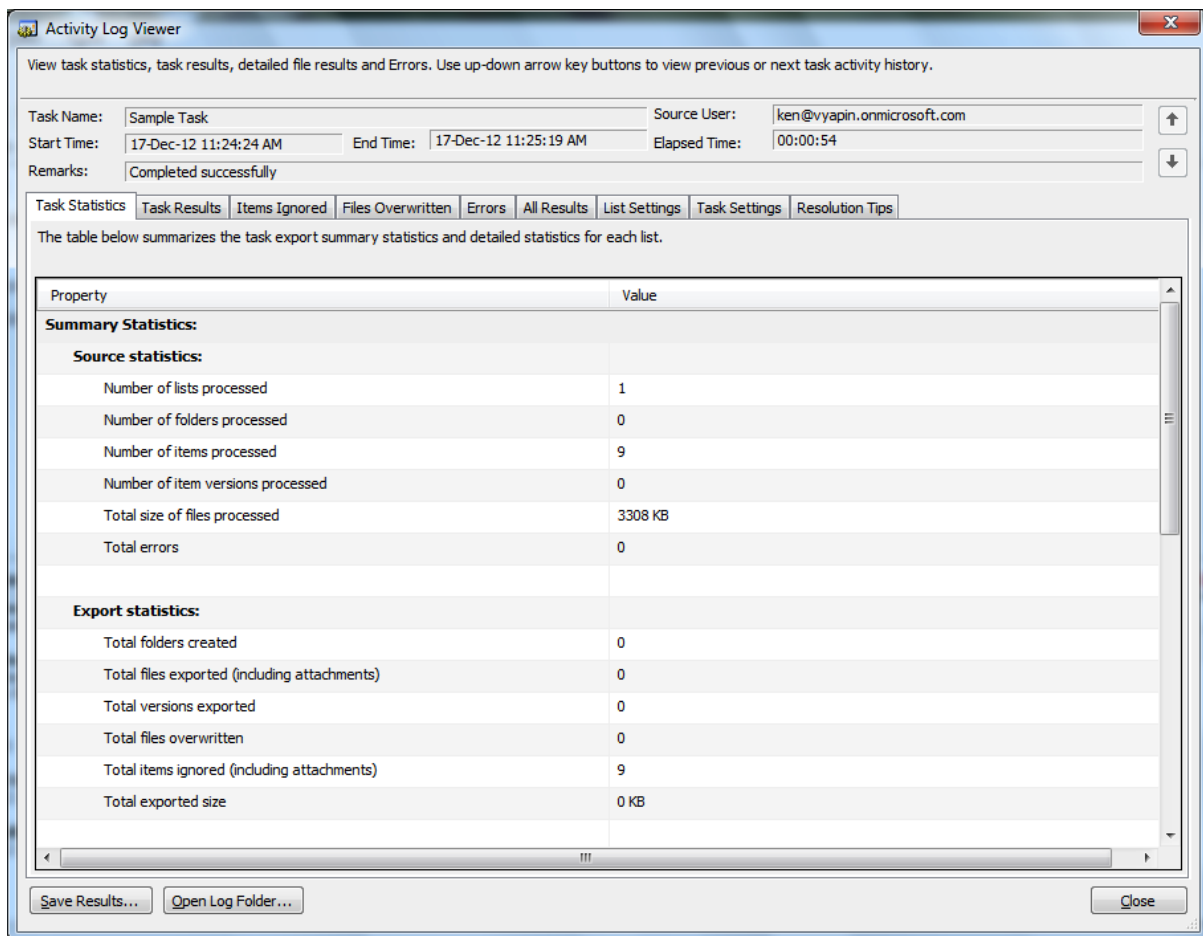


Or Select **View Activity Log** from **Tools** menu



## Chapter-2-SPListX Features

3) The **Activity Log Viewer** dialog appears as shown below:



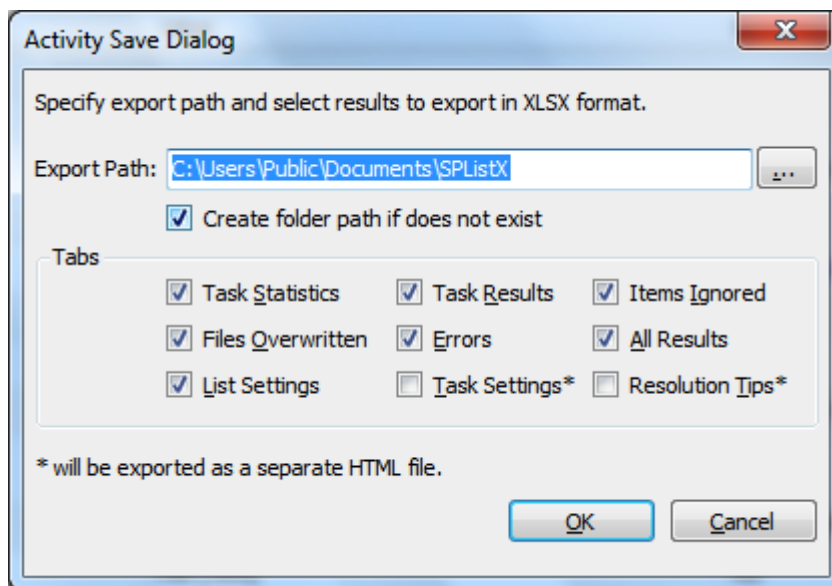
4) The activity log of a task is classified into nine different categories (seen under separate tabs):

- a) **Task Statistics:** Summarizes the manage task summary statistics and detailed statistics for each SharePoint list.
- b) **Task Results:** Summarizes detailed result of each task level check.
- c) **Items Ignored:** Summarizes the items ignored during export process based on certain conditions.
- d) **Files Overwritten:** Summarizes the files overwritten during export process.
- e) **Errors:** Summarizes the errors that occurred during export.
- f) **All Results:** Summarizes the detailed results of the export task.
- g) **List Settings:** Summarizes the destination List Settings at the time of export.
- h) **Task settings:** Summarizes the task settings at the time of export.
- i) **Resolution Tips:** Summarizes the commonly encountered error messages and the ways to address them.

5) Click **Save Results** button.

## Chapter-2-SPListX Features

The **Activity Save dialog** appears as shown below:



- 6) Select reports to save task results in Microsoft Excel format (XLSX). Each report in ActivityLogViewer dialog is stored as a separate worksheet in MS-Excel.

**NOTE:** Task Settings and Resolution Tips will be exported as a separate HTML file.

- 7) Click **Open Log Folder** buttons, to open the folder that contains the activity log of the currently displayed task history item.

**NOTE:** For all errors, refer **File Errors** section of Activity Log to view a description of the actual error that occurred during export.

## 3 Export SharePoint List contents using the browse option

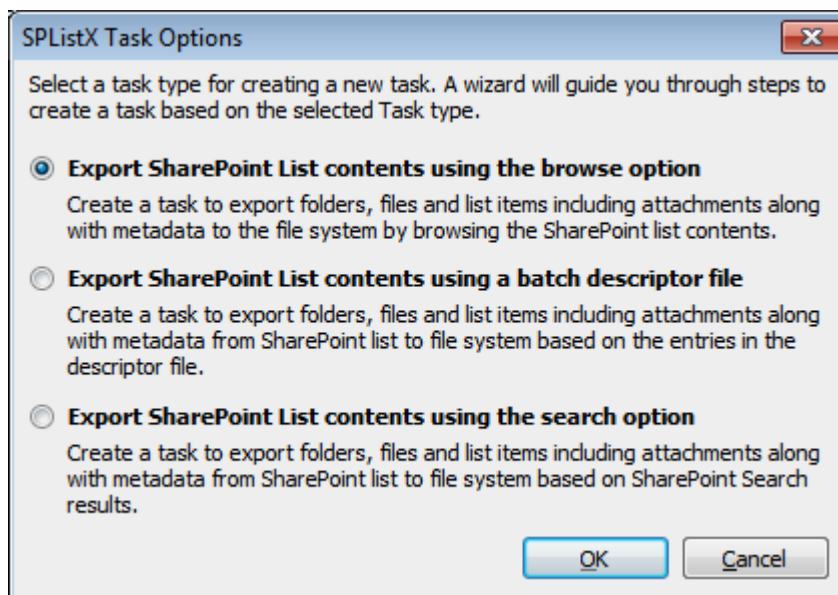
---

### 3.1 Create Task

---

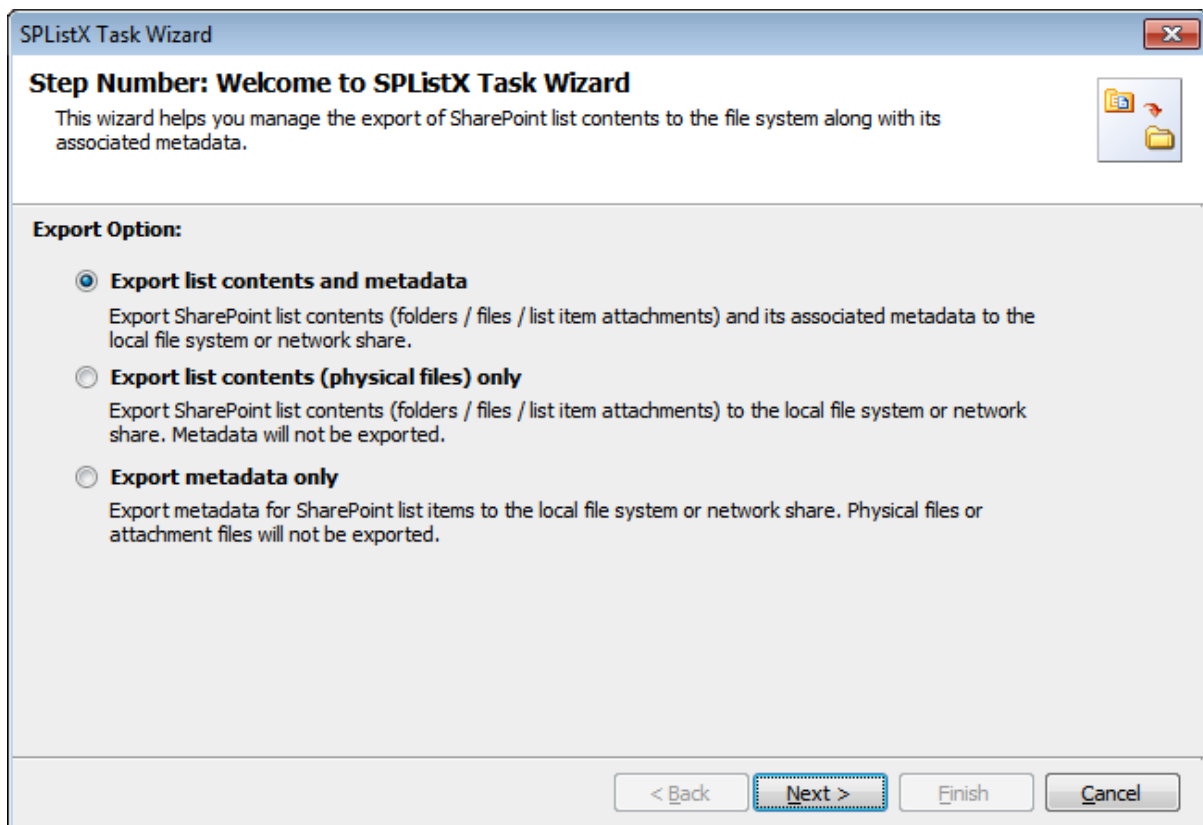
To create a task to export folders / files / list items including attachments along with their metadata from SharePoint List to file system or network share:

- 1) Select **Export SharePoint List contents using the browse option** in **SPListX Task Options** dialog as shown below and click **OK**.



## CHAPTER 3 – Export SharePoint List contents using the browse option

2) The **SPListX Task Wizard** appears as shown below:



3) Click **Next** button

4) Specify the **SharePoint source location**

5) Add **Folders and items to export**

6) Specify **List View Options**

7) Specify **Version Options**

8) Specify **Permission Options**

9) Specify **Export Conditions**

10) Specify **Document Packaging Options**

11) Add **Destination Folder Option**

12) Specify **File Settings**

13) Specify **Metadata File Settings**

14) Specify **Task Settings**

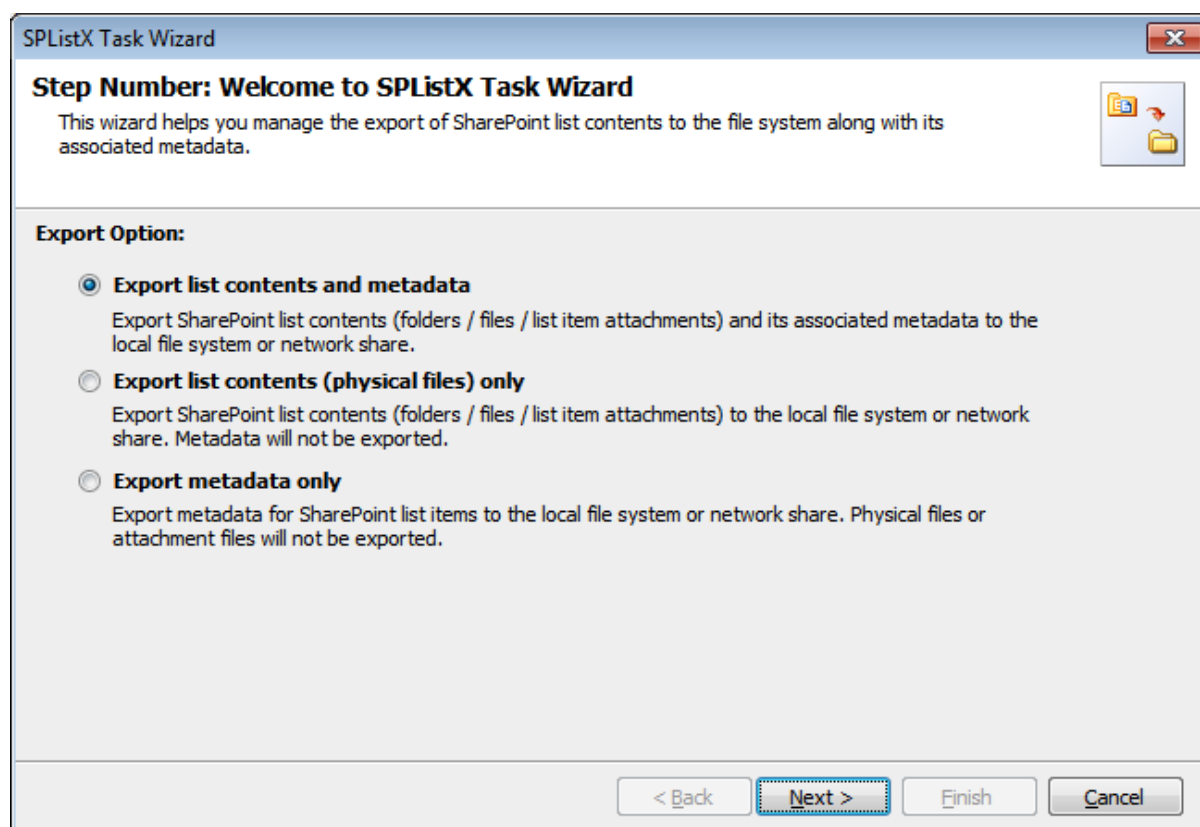
15) Click **Finish** button to create the task, or click **Back** button to change the task settings.

### 3.2 Export Options

You can create a task to export folders / files / list items including attachments along with their metadata from SharePoint List to file system or network share. The export task enables users to select the export options in order to specify his requirements.

- A. Export list contents and metadata:** Export SharePoint list contents (folders/files/list item attachments) and its associated metadata to the local file system or network share.
- B. Export list contents (physical files) only:** Export SharePoint list contents (folders/files/list item attachments) to the local file system or network share. Metadata will not be exported.
- C. Export metadata only:** Export metadata for SharePoint list contents to the local file system or network share. Physical files or attachment files will not be exported.

1) The **Export Options** step appears as shown below:



Select the required export options. The wizard guides you with the steps accordingly.



### 3.3 SharePoint source location

To specify a SharePoint URL of a site / list / folder location from which you wish to export folders, files and list items including attachments to the file system, perform the steps given below:

- 1) The **SharePoint source location** step appears as shown below:

The screenshot shows the 'SPListX Task Wizard' dialog box. The title bar says 'SPListX Task Wizard'. The main heading is 'Step Number: SharePoint URL and credentials'. Below this, a text box explains: 'Specify a SharePoint URL of a site / list / folder location from which you wish to export folders, files and list items to file system. User account specified below will be used to connect to SharePoint when running the export task.' There is a small icon of a folder with a red arrow pointing to it. Below the text is a 'URL:' label followed by a text input field. To the right of the URL field is a checkbox labeled 'Add to Favorites'. Below the URL field is the section 'SharePoint user credential:'. There are two radio button options. The first option is selected: 'Use the following credential to connect to SharePoint'. Below this option is a text box that says 'Connect to SharePoint using the specified user credentials. SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.' Below this text box are two input fields: 'User name:' and 'Password:'. The 'User name:' field contains 'VYAPINLAB\kevin' and has a dropdown arrow and a button with three dots. Below the 'User name:' field is a text box containing '(johndoe@contoso.com, contoso\johndoe, johndoe)'. The 'Password:' field contains a series of dots. The second radio button option is 'Use Web Single Sign-on credential to connect to SharePoint'. Below this option is a text box that says 'Connect to SharePoint sites configured with ADFS as identity provider (including Office365)'. At the bottom of the dialog box are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

- 2) Specify a valid SharePoint URL in the URL textbox. You can specify a SharePoint site, list or folder location in the URL textbox. SPListX will load the tree view of the source location from the level specified in this textbox
- 3) Specify the users' credentials to connect to the SharePoint URL specified above using the options given below:
  - a) **Use the following credential** - Connect to SharePoint URL using the user context stored in the user profile (OR) Enter the user name in any ONE of the following formats: **<DOMAIN NAME>\<USER NAME>,UserName@DomainName, UserName** and its corresponding password. SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

## CHAPTER 3 – Export SharePoint List contents using the browse option

**b) Use Web Single Sign-on credential to connect to SharePoint** - Connect to SharePoint URL using federated identity configured using ADFS. Use this option to connect to Office365 SharePoint Online configured using federated identity provider.

**4) Select Add to Favorites** checkbox to add the URL to SharePoint Favorites.

The screenshot shows the 'SPListX Task Wizard' dialog box, specifically the 'Step Number: SharePoint URL and credentials' screen. The dialog has a title bar with 'SPListX Task Wizard' and a close button. The main content area includes a text box for the URL, a checkbox for 'Add to Favorites', and two radio button options for authentication. The first option, 'Use the following credential to connect to SharePoint', is selected. It includes fields for 'User name' (containing 'VYAPINLAB\kevin') and 'Password' (masked with dots). A small icon in the top right corner shows a folder with a red arrow pointing to it. At the bottom, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

**Step Number: SharePoint URL and credentials**

Specify a SharePoint URL of a site / list / folder location from which you wish to export folders, files and list items to file system. User account specified below will be used to connect to SharePoint when running the export task.

URL:

☐ Add to Favorites

**SharePoint user credential:**

☒ **Use the following credential to connect to SharePoint**  
Connect to SharePoint using the specified user credentials. SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

User name:

(johndoe@contoso.com, contoso\johndoe, johndoe)

Password:

☐ **Use Web Single Sign-on credential to connect to SharePoint**  
Connect to SharePoint sites configured with ADFS as identity provider (including Office365)

< Back   Next >   Finish   Cancel

**5) In order to connect Office365's SharePoint Online environment, you can use Web Single Sign-on** option for both Cloud Identity (Office 365 Online Credential e.g., johndoe@vyapin.onmicrosoft.com) and Federated Identity (configured via ADFS e.g., johndoe@vyapin.com).

## CHAPTER 3 – Export SharePoint List contents using the browse option

The screenshot shows the 'SPListX Task Wizard' window. The title bar says 'SPListX Task Wizard'. The main heading is 'Step Number: SharePoint URL and credentials'. Below this, a text box says: 'Specify a SharePoint URL of a site / list / folder location from which you wish to export folders, files and list items to file system. User account specified below will be used to connect to SharePoint when running the export task.' There is a text input field for 'URL:' containing 'https://vyapin.sharepoint.com'. To the right of this field is a checkbox labeled 'Add to Favorites'. Below the URL field is the section 'SharePoint user credential:'. There are two radio button options. The first is 'Use the following credential to connect to SharePoint', which is currently unselected. Below it, a text box for 'User name:' contains 'VYAPINLAB\kevin'. Below that, a smaller text box contains '(johndoe@contoso.com, contoso\johndoe, johndoe)'. Below the user name is a 'Password:' field with masked characters. The second radio button option is 'Use Web Single Sign-on credential to connect to SharePoint', which is currently selected. Below it, a text box contains 'Connect to SharePoint sites configured with ADFS as identity provider (including Office365)'. At the bottom of the window are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

- 6) Upon *clicking* **Next** button to proceed, you will be prompted for credential (username and password) as shown below:

The screenshot shows the Microsoft Office 365 login page. The address bar shows 'https://login.microsoftonline.com'. The page has the Microsoft Office 365 logo at the top. Below the logo are two text input fields: 'User ID:' and 'Password:'. Below the password field is a link that says 'Forgot your password?'. Below that are two checkboxes: 'Remember me' (checked) and 'Keep me signed in' (unchecked). Below the checkboxes is a 'Sign in' button. At the bottom of the page, there is a line of text: 'Don't have a user ID assigned by your organization? Use a Hotmail account to sign in'. At the very bottom, there is a footer: '©2012 Microsoft Corporation | Privacy | Legal'.

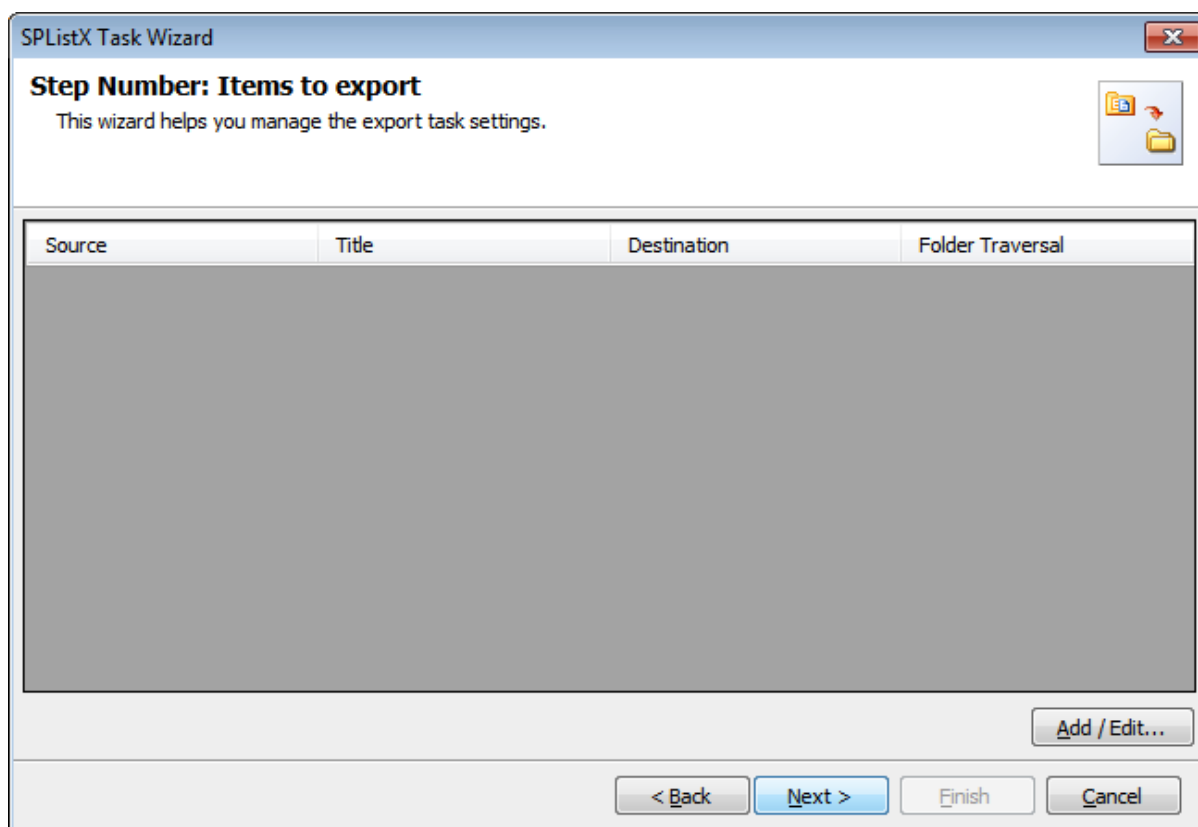
Provide **User ID** and **Password** in the respective textboxes and *click* **Sign in** button to proceed.

### 3.4 Items to Export

---

To add folders and items to export to the destination location in the file system:

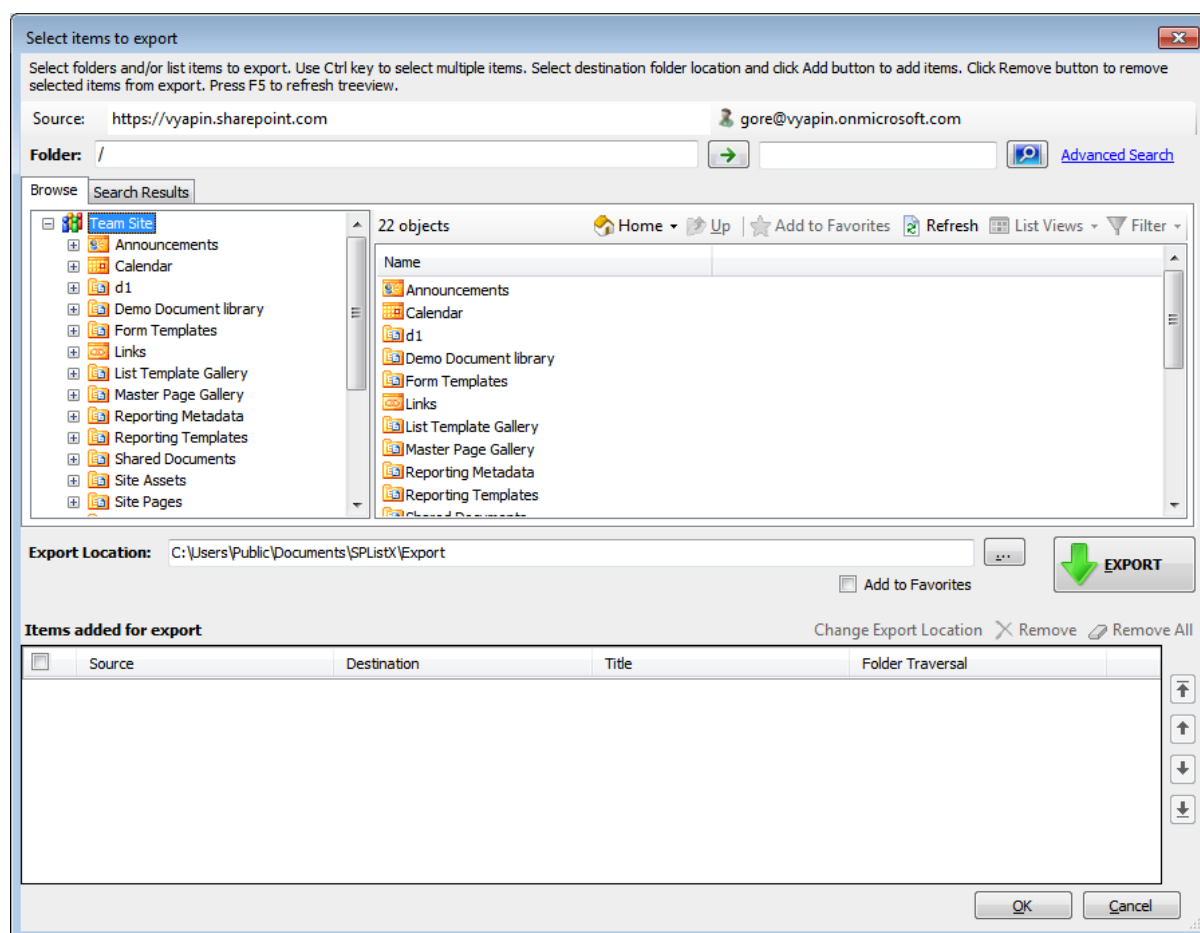
- 1) The **Items to export** step appears as shown below:



- 2) Click **Add / Edit** button to add and remove the folders and items for export.

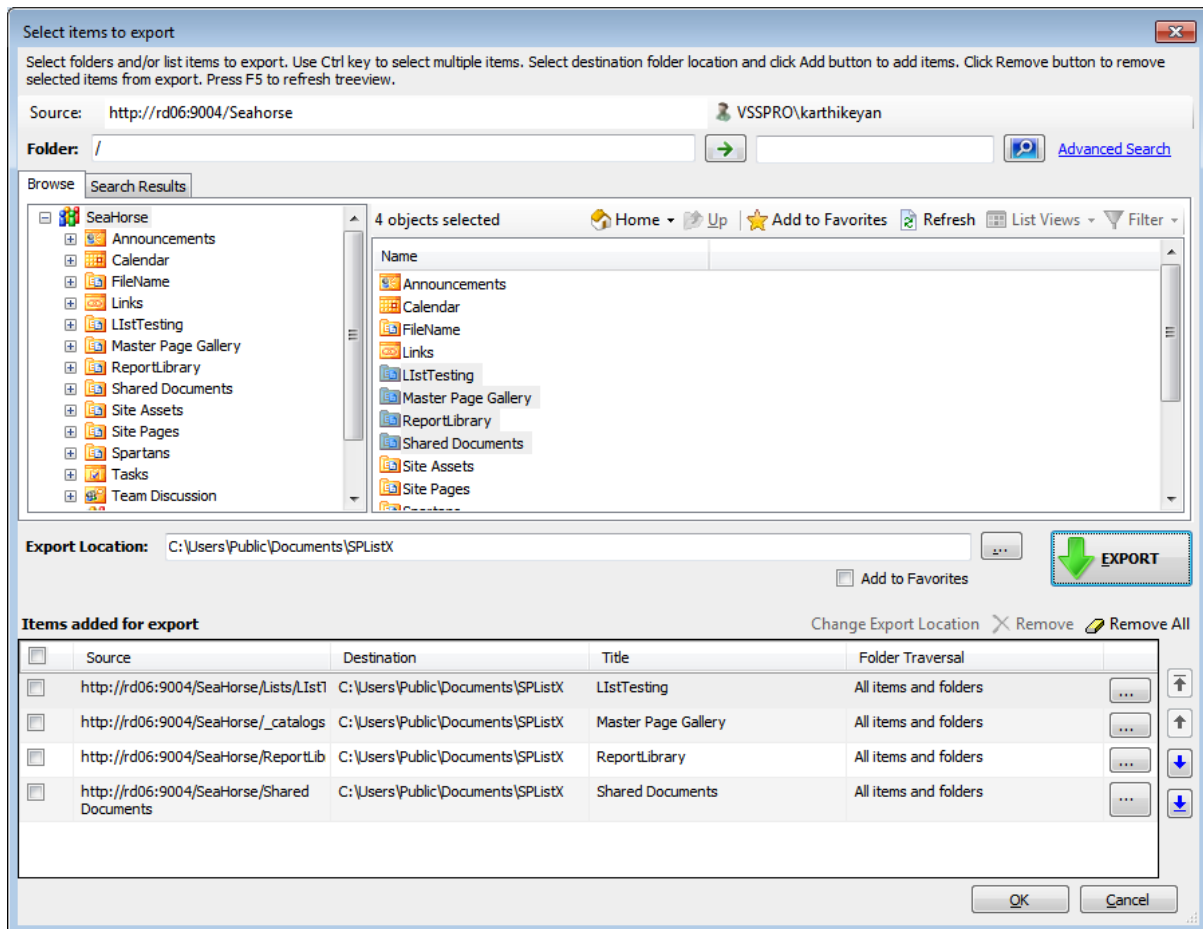
## CHAPTER 3 – Export SharePoint List contents using the browse option

3) The **Select items to export** dialog appears as shown below:



4) **Select items to export** dialog contains a textbox (top), tree-view (top-left) and a list-view (top-right), which provides explorer like view to select site collection folder / file / list item to export. The **Folder** textbox allows you to directly browse the specified folder location in the connected SharePoint list. You must specify the folder's relative path and *Click the arrow button* to mount the specified folder as a root item in the explorer view. This option will be very useful if the connected list contains large number of folders and sub-folders. The search textbox allows you to search for list items for the keyword specified in search textbox. Advanced Search Link will be enabled for site that has office search service. You will also see a textbox (middle) and browse button, which enables selection of destination location to export folders / items.

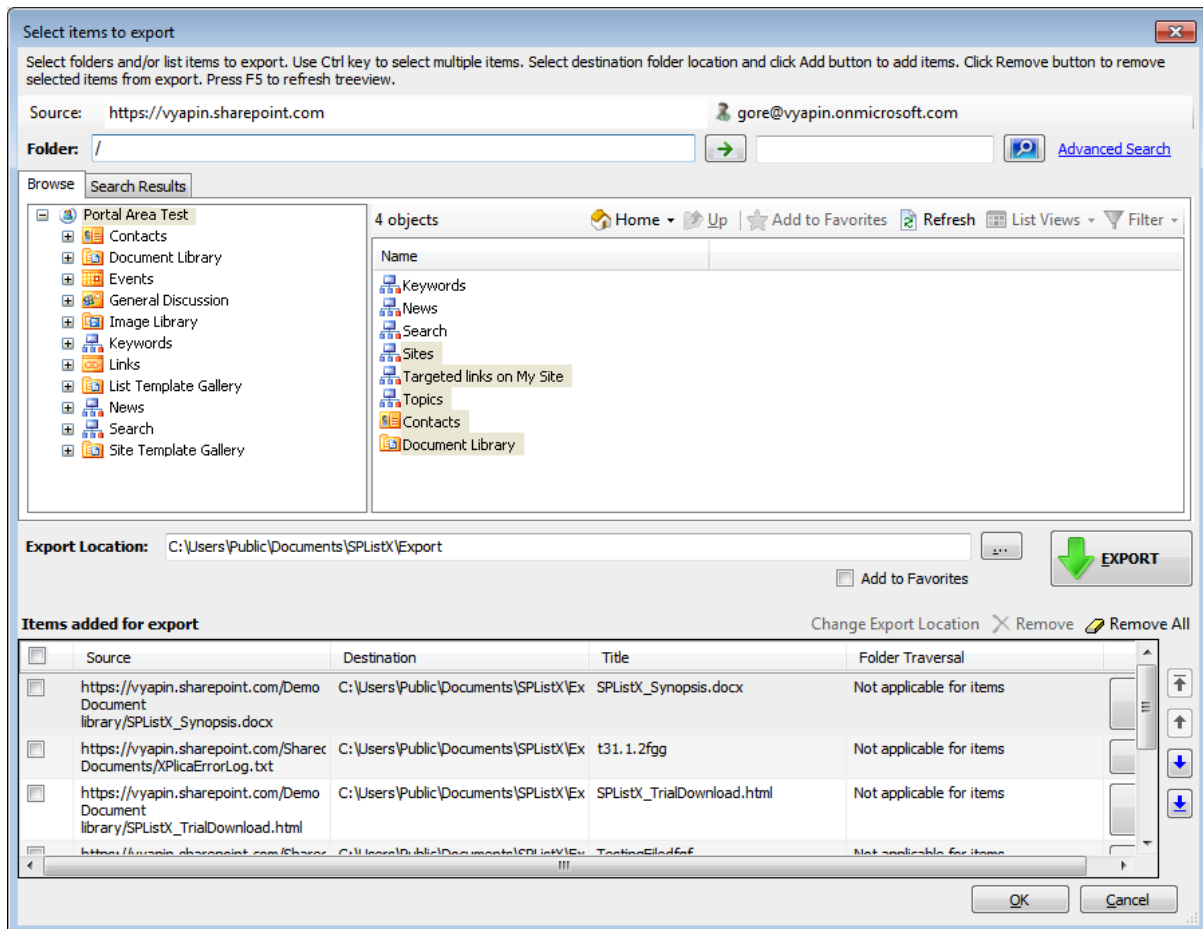
## CHAPTER 3 – Export SharePoint List contents using the browse option



- 5) Browse the source folders and list items of connected SharePoint list and select the required folders and list items from either tree view (top left pane) or list view (top right pane). Select a destination location using browse option or enter the destination location path in the textbox and **click Add** button to export selected items.

All folders, files, list items including attachments, lists of a site and its sub-site can be exported by selecting Site collection node from tree-view. In SharePoint 2003, all folders, files, list items including attachments, lists of an area and its sub-area can be exported to file system.

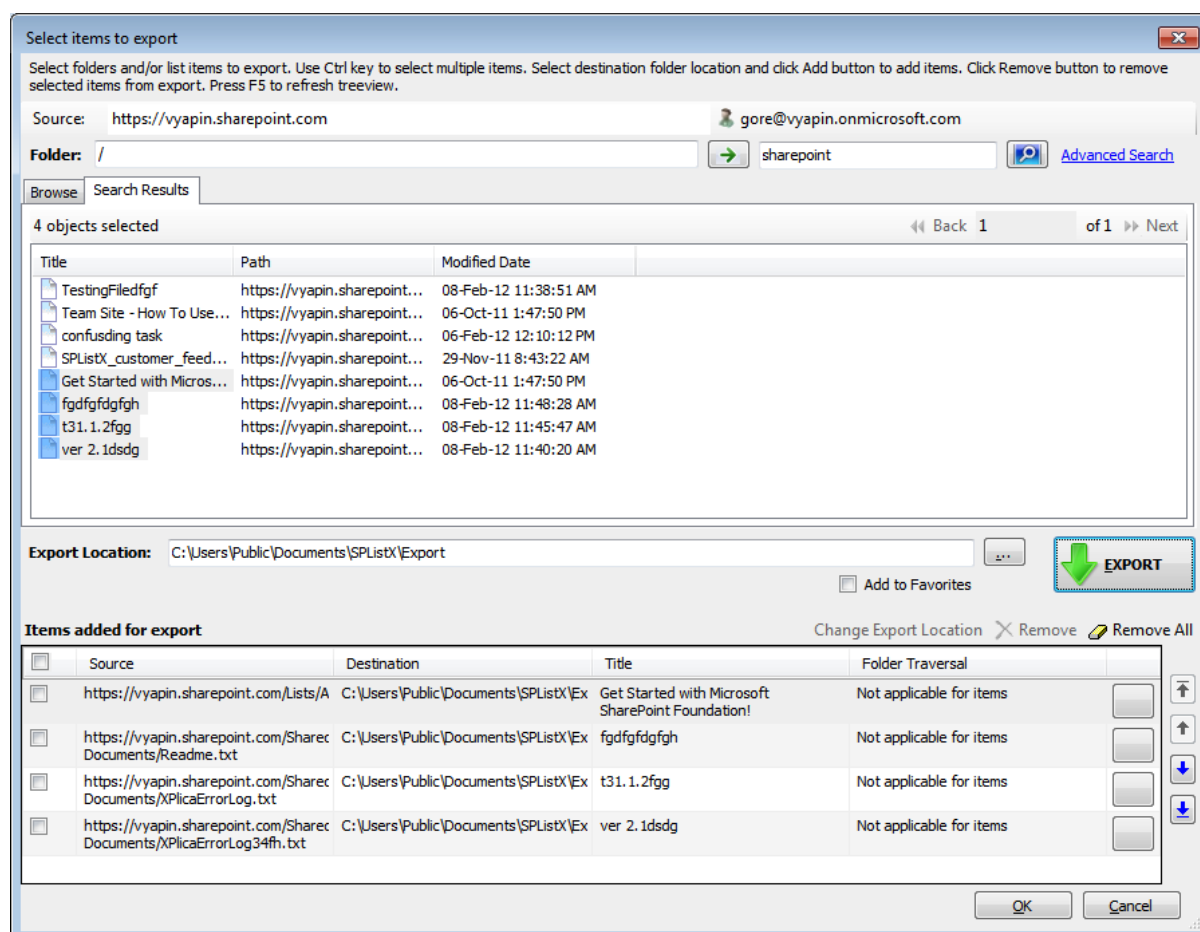
## CHAPTER 3 – Export SharePoint List contents using the browse option



- 6) You can perform keyword search by entering search keyword in search keyword textbox and selecting the list items based on search results for exporting to the file system.

**NOTE:** Exporting based on search results is not applicable for SharePoint 2003.

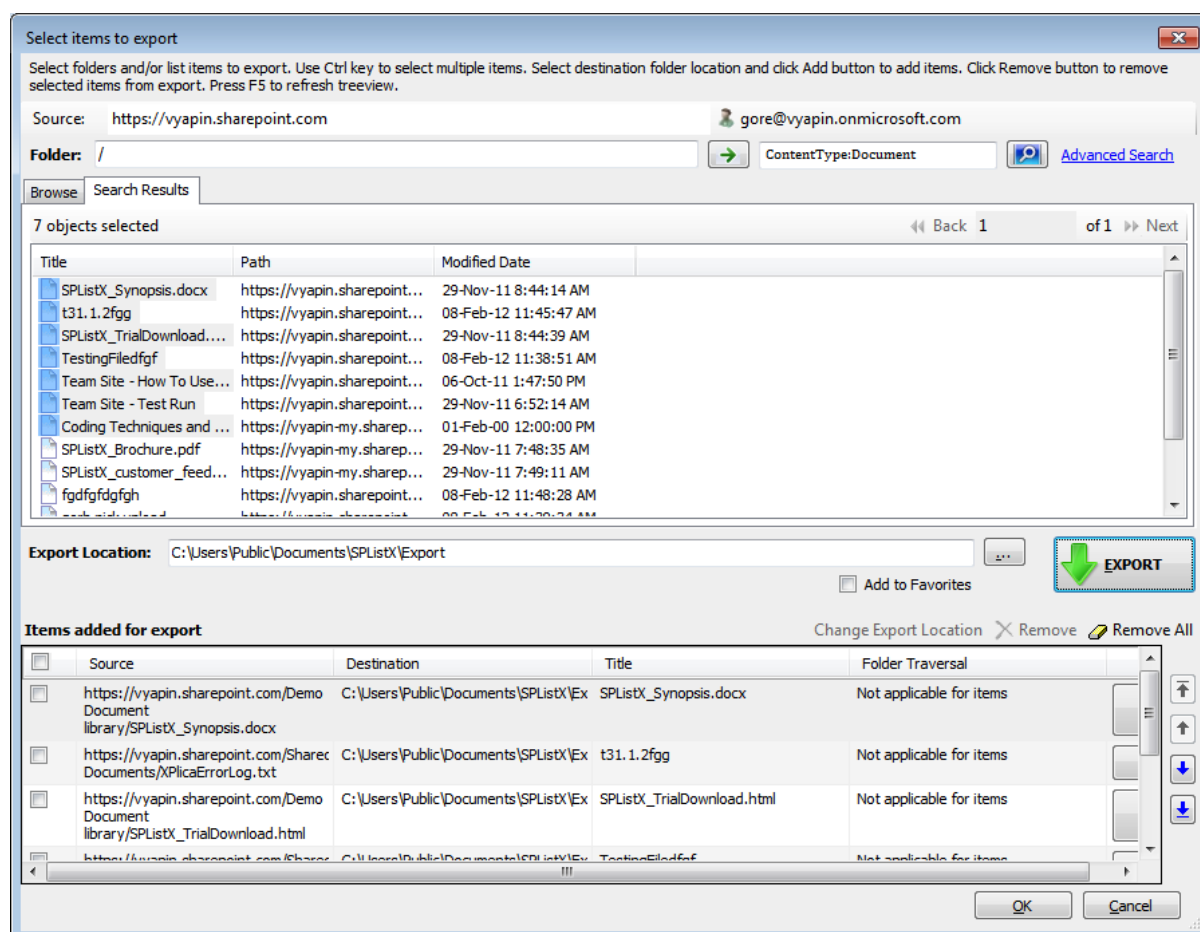
## CHAPTER 3 – Export SharePoint List contents using the browse option



You can also enhance your keyword search by specifying Managed Property with value in keyword search textbox.



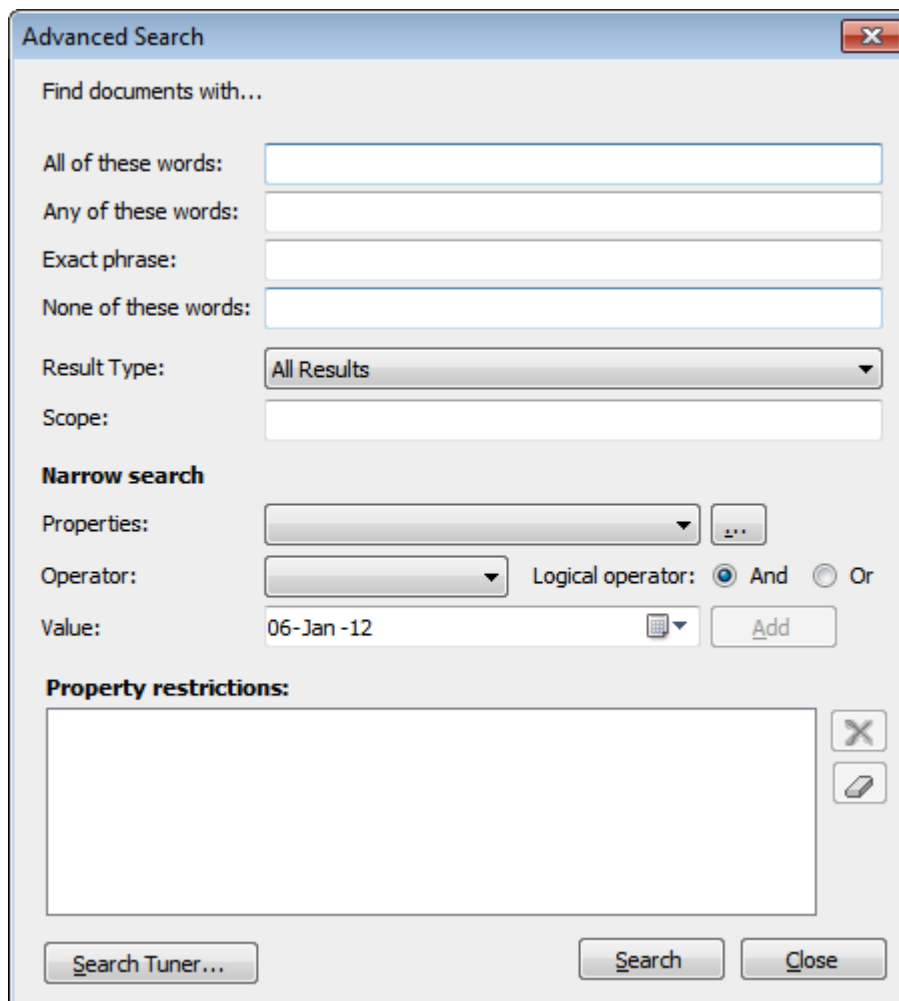
## CHAPTER 3 – Export SharePoint List contents using the browse option



If advanced search is enabled in SharePoint site then you can perform advanced search by clicking advanced search link.

## CHAPTER 3 – Export SharePoint List contents using the browse option

The **Advanced Search** dialog appears as shown below:



The **Advanced Search** dialog box is used to find documents. It includes fields for search criteria and options to narrow the search.

Find documents with...

All of these words:

Any of these words:

Exact phrase:

None of these words:

Result Type:

Scope:

**Narrow search**

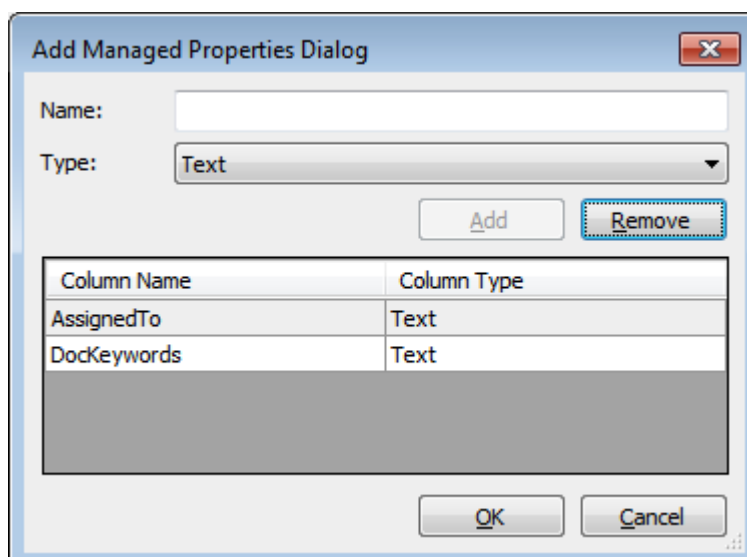
Properties:

Operator:  Logical operator: ☒ And ☐ Or

Value:

**Property restrictions:**

Click (...) button to *add* the SharePoint managed properties in properties drop-down. The **Add Managed Properties** Dialog appears as shown below:



The **Add Managed Properties** dialog box is used to add managed properties to the search criteria.

Name:

Type:

Column Name	Column Type
AssignedTo	Text
DockKeywords	Text

## CHAPTER 3 – Export SharePoint List contents using the browse option

Specify the managed *property name* in **Name** textbox and select the data **type** of the column in SharePoint in the **Type** drop-down.

Click **Add** button to add the managed *property* to the *property drop-down*.

Click **Remove** button to remove the *columns* from the *property drop-down*.

You can specify the conditions by selecting the property name and by specifying a corresponding value with the necessary operator. You can use mathematical operators such as >, =, >= etc. to define your query. Complex queries can be constructed by using logical operator 'AND' or 'OR'.

Advanced Search

Find documents with...

All of these words: SharePoint

Any of these words: Welcome

Exact phrase:

None of these words:

Result Type: All Results

Scope:

**Narrow search**

Properties: Author

Operator: =

Value: ken

Logical operator: ☒ And ☐ Or

Add

**Property restrictions:**

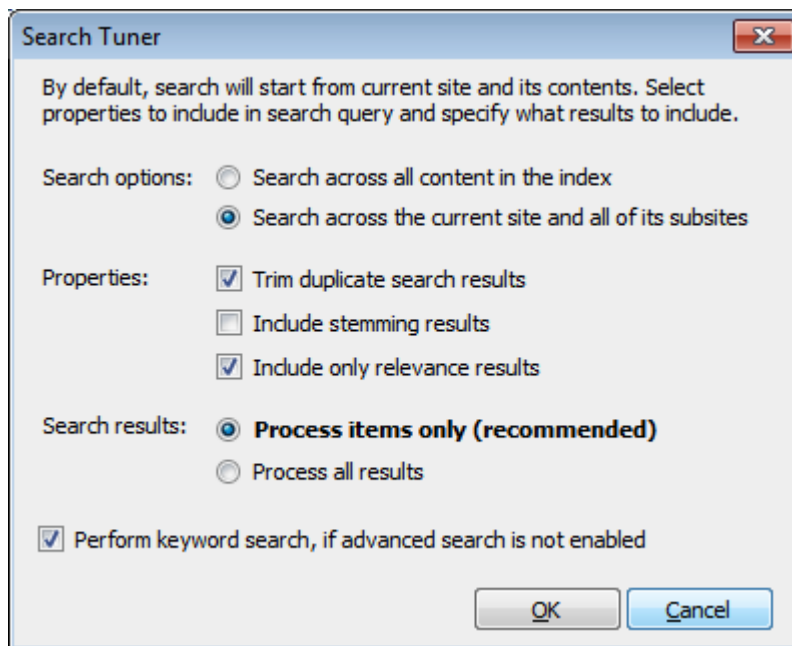
[Author] = 'ken'

Search Tuner... Search Close

You can Tune search by clicking **Search Tuner...** button.

## CHAPTER 3 – Export SharePoint List contents using the browse option

The **Search Tuner** dialog appears as shown below:



### a) Search Options:

*Search across all content in the index* - SPListX will search for list items across all the indexed content.

*Search across the current site and all of its sub-site* - By default, SPListX will search for list items at current site and all of its sub-sites.

### b) Properties:

*Trim duplicate search results* - By default, SPListX will remove the duplicate items from search results.

*Include stemming results* - By default, SPListX will not include the stemming results.

*Include only relevance results* - By default, SPListX will include only relevance results.

### c) Search results:

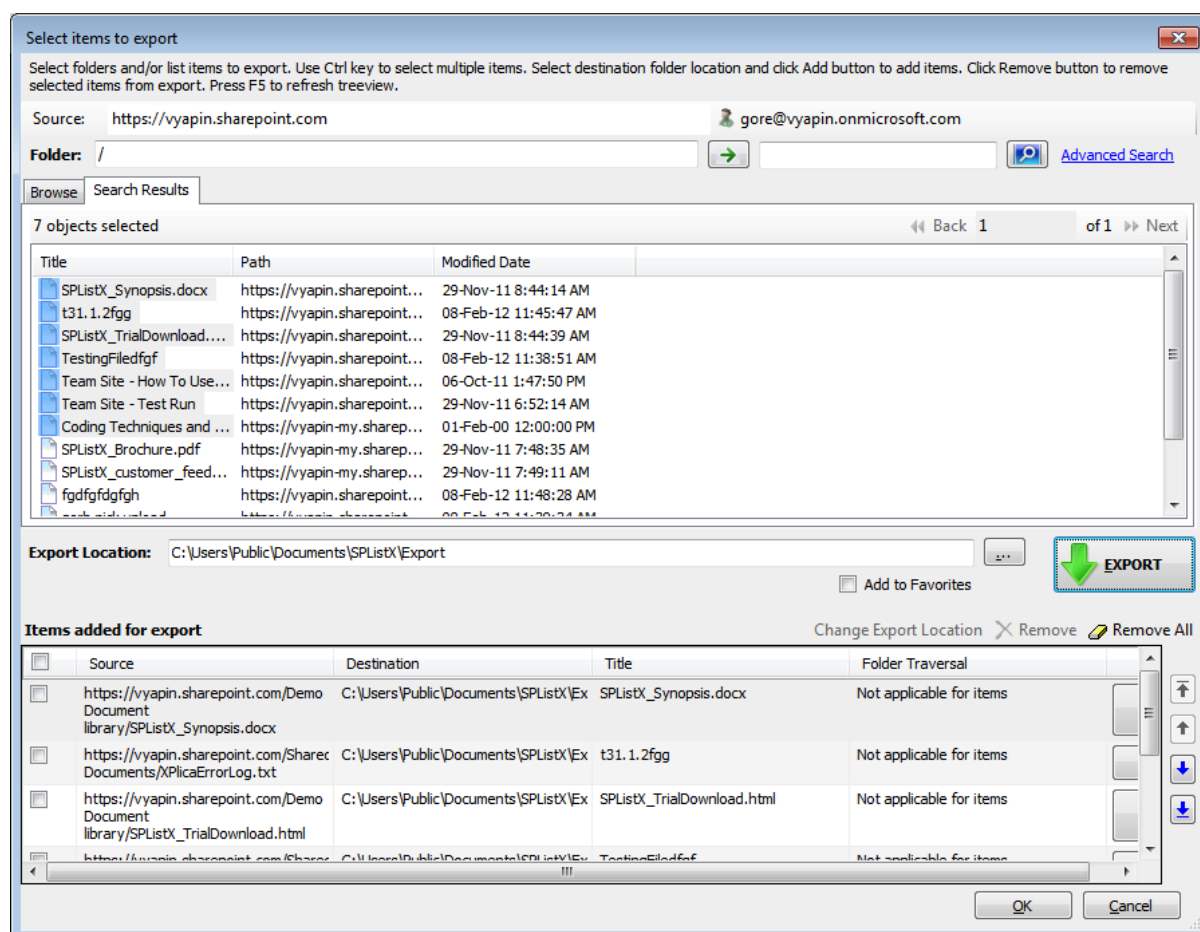
*Process only items (recommended)* - By default, SPListX will search for list items only.

*Process all results* - SPListX will include all list view URLs, site URLs in search.

### d) Perform keyword search, if advanced search is not enabled


- To perform keyword search based on your keywords specified in all keywords textbox, Any Keywords textbox, Exact Phrase textbox and it will ignore all the properties, scopes and result types specified in search query.

## CHAPTER 3 – Export SharePoint List contents using the browse option



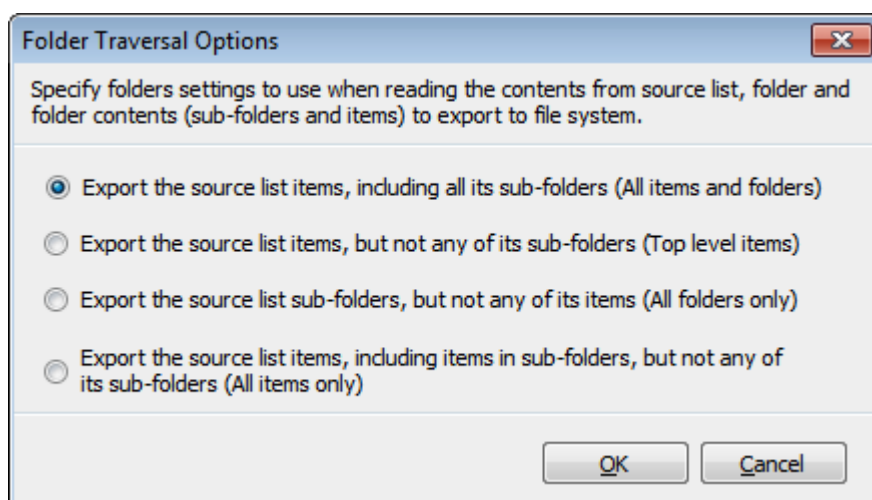
7) The selected top level site, sub-sites, lists, folders, files and list **items added for export** will be displayed in the Items added for export grid. SPLiSTX processes the top-level folders and list items added for export in the order in which it appears in the **Items added for export** grid. The export process order can be changed by the **navigation** buttons available in the right side of the grid.

8) SPLiSTX will export the folders, list items and associated metadata based on Folder Traversal Option.

Use  button to edit the folder traversal option for list, folders that are added in **added for export grid view**.

## CHAPTER 3 – Export SharePoint List contents using the browse option

A **Folder Traversal** *dialog* appears as shown below:



Select any one of the following options given below to specify the contents to be exported from the source folders in SharePoint:

- a) **Export the source list items, including all its sub-folders (All items and folders)** - This option exports folders and list items exactly as they are in source SharePoint list. The source folder structure in the list will be retained in the destination location.
- b) **Export the source list items, but not any of its sub-folders (Top level items)** - This option exports list items available in the top-level folders only. SPListX will not traverse the sub-folders within the top level folders.
- c) **Export the source list sub-folders, but not any of its items (All folders only)** - This option creates the sub-folder structure in the destination location and ignores all list items that are available within the added top level folder and sub-folders.
- d) **Export the source list items, including items in sub-folders, but not any of its sub-folders** - This option exports list items only and ignore its source folder structure in the source list. In case of duplicate file names, file exported last will overwrite the existing file in the destination location.

**NOTE:** Folder Traversal option is not applicable for list items.

- 9) Click **OK** button to proceed or click **Cancel** to discard the changes.

## CHAPTER 3 – Export SharePoint List contents using the browse option

**10) Items to export** steps contains top level site, sub-sites, document library, folders and files added for export as shown below:

**SPListX Task Wizard**

**Step Number: Items to export**  
This wizard helps you manage the export task settings.

Source	Title	Destination	Folder Traversal
http://rd06:9004/SeaHorse/Lis	ListTesting	C:\Users\Public\Documents\SPI	All items and folders
http://rd06:9004/SeaHorse/_c	Master Page Gallery	C:\Users\Public\Documents\SPI	All items and folders
http://rd06:9004/SeaHorse/Re	ReportLibrary	C:\Users\Public\Documents\SPI	All items and folders
http://rd06:9004/SeaHorse/Sh Documents	Shared Documents	C:\Users\Public\Documents\SPI	All items and folders

[Add / Edit...](#)

< Back   Next >   Finish   Cancel

**11)** Click **Next** to Proceed

### 3.5 List View Options

You can export list items or documents based on SharePoint List views and thereby specify the SharePoint columns to export metadata.

To selectively export SharePoint Views from the list / library, follow the steps outlined below:

1) The **List View Options** wizard step appears as shown below:

The screenshot shows a window titled "SPListX Task Wizard - Sample Task". The main heading is "Step Number: List View Options" with the subtitle "Export list items / documents based on SharePoint List Views." In the top right corner, there is an icon of a folder with a red arrow pointing to it. The "View Settings:" section has four radio buttons: "All items in the List View (AllItems.aspx). Select Columns to export." (which is selected), "Default View", "All Views", and "Specific Views". Below this is the "Columns to export" section with three radio buttons: "Export all columns" (with an information icon), "Export all user defined columns" (which is selected and has an information icon), and "Export selected columns". Under "Export selected columns", there is a text box with the placeholder "<Type column names here>" and a list of examples: "Title" and "Description". To the right of the text box, a note says: "Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column." At the bottom of the window, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

2) Select any one of the following **View Settings** given below:

a) **All items in the List View (AllItems.aspx). Select Columns to export.**

Export all items / documents (including folders) in the list view as it appears in AllItems.aspx web page corresponding to the list. You have the additional option to specify the SharePoint columns to export as per the options below:

- i. **Export all columns** - Exports all columns available in the source SharePoint list, including built-in SharePoint columns such as Created, Modified, Approval Status, etc.
- ii. **Export all user defined columns** - Exports all columns that are created by a SharePoint user.



## CHAPTER 3 – Export SharePoint List contents using the browse option

- iii. **Export selected columns** - Exports columns that are specified in the textbox.

SPListX Task Wizard - Sample Task

**Step Number: List View Options**  
Export list items / documents based on SharePoint List Views.

View Settings: ☒ All items in the List View (AllItems.aspx). Select Columns to export.  
☐ Default View  
☐ All Views  
☐ Specific Views

Columns to export

☐ Export all columns   
☐ Export all user defined columns   
☒ Export selected columns

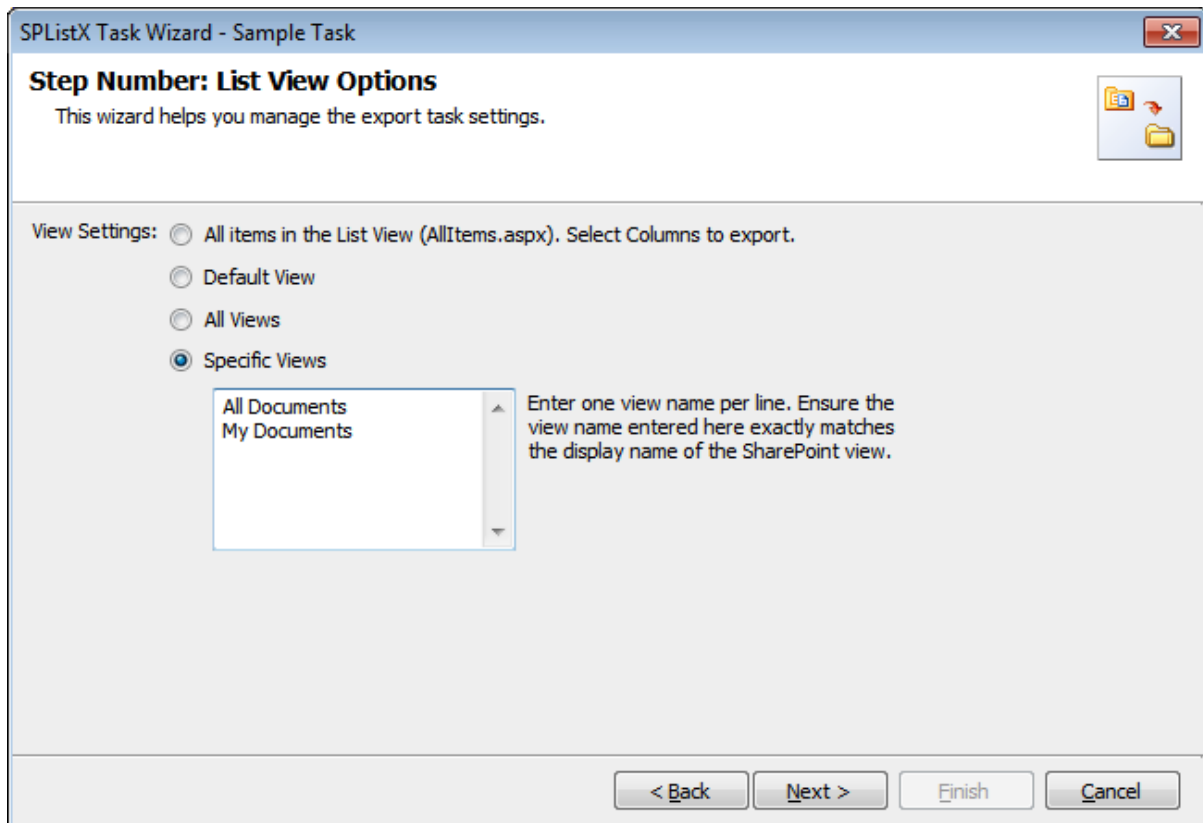
Title  
ContentType

Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.

< Back   Next >   Finish   Cancel

- b) Default View** - Exports all items (including folders) available in the Default view of the given SharePoint list. The SharePoint columns defined in the default view will be exported to the metadata file.
- c) All Views** - Exports all Views in the SharePoint list. The SharePoint columns defined in the respective list views will be exported to the metadata file.
- d) Specific Views** - Exports views that are specified in the textbox. The SharePoint columns defined in the respective list views will be exported to the metadata file.

## CHAPTER 3 – Export SharePoint List contents using the browse option



The screenshot shows a Windows-style dialog box titled "SPListX Task Wizard - Sample Task". The main heading is "Step Number: List View Options". Below the heading is a descriptive sentence: "This wizard helps you manage the export task settings." In the top right corner, there is a small icon showing a folder with a red arrow pointing into it. The main content area is titled "View Settings:" and contains four radio button options: "All items in the List View (AllItems.aspx). Select Columns to export.", "Default View", "All Views", and "Specific Views". The "Specific Views" option is selected. Below this selection is a text box containing the text "All Documents" and "My Documents". To the right of the text box is a note: "Enter one view name per line. Ensure the view name entered here exactly matches the display name of the SharePoint view." At the bottom of the dialog, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

SPListX Task Wizard - Sample Task

**Step Number: List View Options**

This wizard helps you manage the export task settings.

View Settings:

- ☐ All items in the List View (AllItems.aspx). Select Columns to export.
- ☐ Default View
- ☐ All Views
- ☒ Specific Views

All Documents  
My Documents

Enter one view name per line. Ensure the view name entered here exactly matches the display name of the SharePoint view.

< Back   Next >   Finish   Cancel

Click **Next** to proceed.

### 3.6 Version Options

To selectively export list item versions to the destination file system location:

- 1) The **Version Options** step appears as shown below:

**SPListX Task Wizard - Sample Task**

**Step Number: Version Options**

Specify the list item versions to export. By default, latest version of the list item will be exported.

**Export Versions:**

- ☒ All versions
- ☐ Export version range: Start:  End:
- ☐ Export version date range: Start: 20-Feb-12 ☐ End: 20-Feb-12
- ☐ Export major versions only
- ☐ Latest version only

**File Version Handling:**

- ☒ Export each file version to a version folder named as
- ☐ Store latest version in root folder
- ☐ Store latest version in the respective version folder
- ☐ Export each file version as separate files named as

< Back Next > Finish Cancel

#### 2) Export Versions:

By default, **All versions** option is selected. Item version settings will be used for each of the list item exported from the list. Select any one of the following version settings:

- a) **All versions** - Export all list item versions available in the source list.
- b) **Export version range** - Export only list item versions specified in the range from the source list e.g., versions 2 to 5.
- c) **Export version date range** - Export only list item versions by date specified in the range from the source list e.g., versions date 11/19/2010 - 15/19/2010. The source list date used for exporting is **Modified date** of a list item.
- d) **Export major versions only** - Export the major list item version from the source.
- e) **Latest version only** - Export the latest list item version from the source.

### 3) File Version Handling:

**Step Number: Version Options**  
Specify the list item versions to export. By default, latest version of the list item will be exported.

**Export Versions:**

- ☒ All versions
- ☐ Export version range: Start:  End:
- ☐ Export version date range: Start:  End:
- ☐ Export major versions only
- ☐ Latest version only

**File Version Handling:**

- ☒ Export each file version to a version folder named as
- ☐ Store latest version in root folder
- ☐ Store latest version in the respective version folder
- ☐ Export each file version as separate files named as

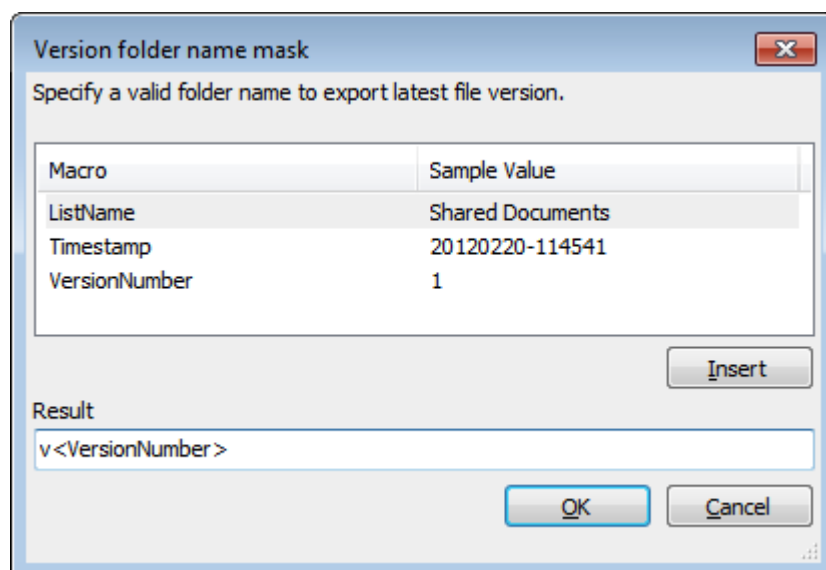
< Back Next > Finish Cancel

Select any one of the following export options:

- a) Export each version to a version folder named as** - This option will create a version folder for each file version based on the version folder name specified in the folder name mask textbox. You have the option to export the latest file version to the root folder or export it to the respective version folder.
  - (i) Store latest version in root folder** – Export the latest file version to the root folder specified by the user. To select Version folder name, click the button placed next to the export version to as version folder name textbox.

## CHAPTER 3 – Export SharePoint List contents using the browse option

**Version folder name mask** dialog appears as shown below:



The dialog box titled "Version folder name mask" contains a table with the following data:

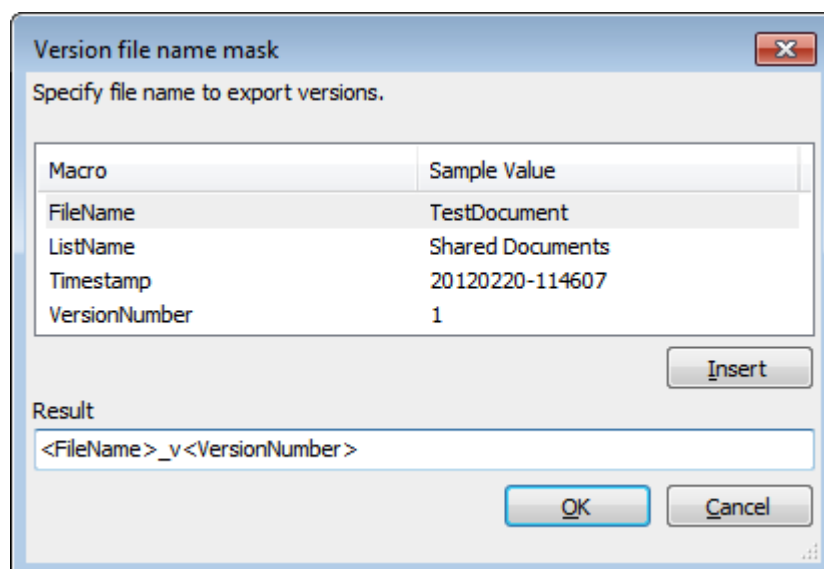
Macro	Sample Value
ListItem	Shared Documents
Timestamp	20120220-114541
VersionNumber	1

Below the table is an "Insert" button. At the bottom, there is a "Result" label and a text box containing the macro `v<VersionNumber>`. At the very bottom are "OK" and "Cancel" buttons.

You can use the available macros to construct the new folder name in the **Result** textbox.

**(ii) Store latest version in the respective version folder** - This option will create a version folder name based on the current file version and export the file into the version folder.

**b) Export each file version as separate files named as** - Each file version will be exported using the file version name constructed in the file version name mask text box. To select **Version file name**, click the button placed next to the export version to a separate file name textbox. Version file name mask dialog appears as shown below:



The dialog box titled "Version file name mask" contains a table with the following data:

Macro	Sample Value
FileName	TestDocument
ListItem	Shared Documents
Timestamp	20120220-114607
VersionNumber	1

Below the table is an "Insert" button. At the bottom, there is a "Result" label and a text box containing the macro `<FileName>_v<VersionNumber>`. At the very bottom are "OK" and "Cancel" buttons.

You can use the available macros to construct the new file name in the **Result** textbox.

**4)** Click **Next** to Proceed.

## CHAPTER 3 – Export SharePoint List contents using the browse option

For **Latest Version Only** option in the Export Versions, you have the option to export the latest file version to the root folder or export it to the respective version folder. The File Version Handling settings appear as shown below:

The screenshot shows a window titled "SPListX Task Wizard - Sample Task" with a close button in the top right corner. The main heading is "Step Number: Version Options" with a sub-instruction: "Specify the list item versions to export. By default, latest version of the list item will be exported." There is a small icon of a folder with a red arrow pointing to it in the top right corner of the main area.

**Export Versions:**

- ☐ All versions
- ☐ Export version range: Start:  End:
- ☐ Export version date range: Start:  ☐ End:
- ☐ Export major versions only
- ☒ Latest version only

**File Version Handling:**

- ☒ Store latest version in root folder
- ☐ Store latest version to a version folder named as

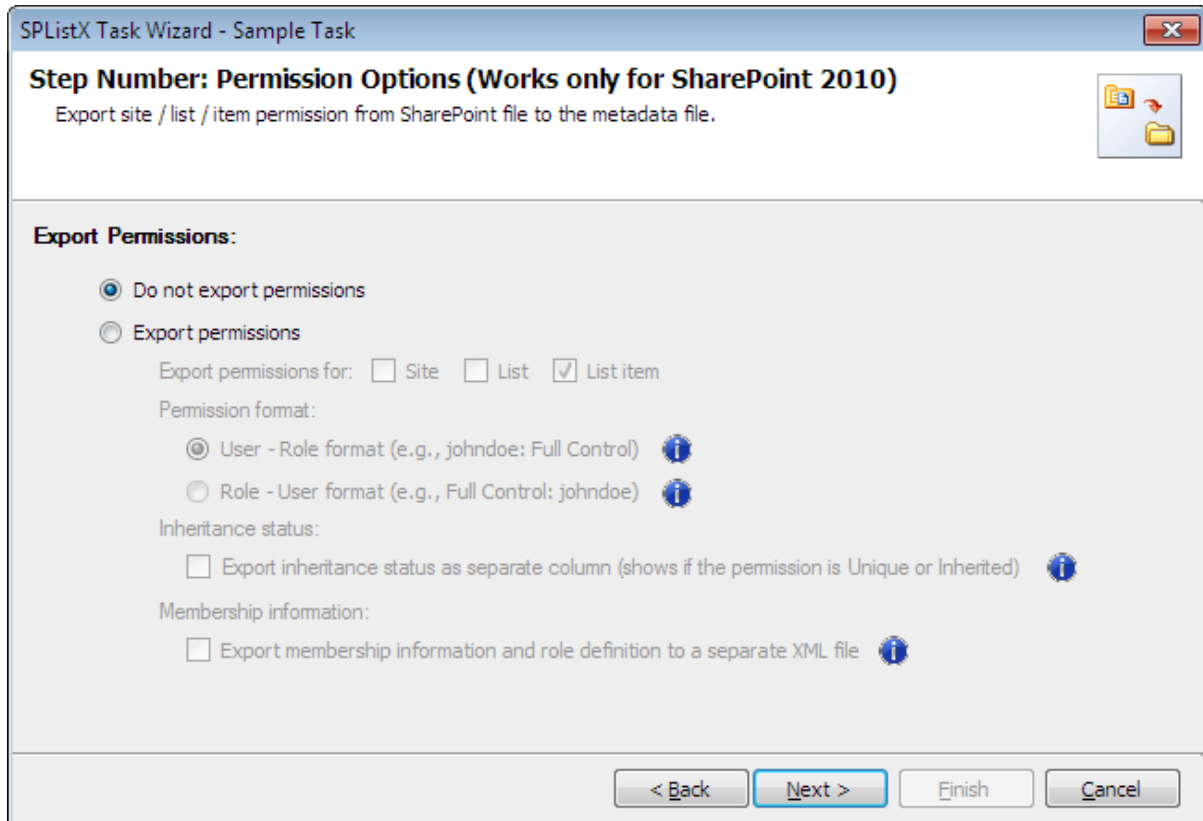
At the bottom, there are four buttons: "< Back", "Next >" (highlighted in blue), "Finish", and "Cancel".

- a) **Store latest version in root folder** - Export the latest version in the root folder itself
- b) **Store latest version in the respective version folder** - Creates a latest version folder and export the latest file version in the latest version folder.

### 3.7 Permission Options

**SPListX** can export SharePoint site / list / list item permission information to the metadata file. This feature works only for SharePoint 2010 environment.

1) The **Permission options** specification wizard step appears as shown below:



**SPListX Task Wizard - Sample Task**

**Step Number: Permission Options (Works only for SharePoint 2010)**  
Export site / list / item permission from SharePoint file to the metadata file.


**Export Permissions:**


☒ Do not export permissions

☐ Export permissions


Export permissions for: ☐ Site ☐ List ☒ List item

Permission format:


☒ User - Role format (e.g., johndoe: Full Control) 

☐ Role - User format (e.g., Full Control: johndoe) 

Inheritance status:

☐ Export inheritance status as separate column (shows if the permission is Unique or Inherited) 

Membership information:

☐ Export membership information and role definition to a separate XML file 

< Back Next > Finish Cancel

#### Export Permissions:

- a) **Do not export permissions** - This option will not export permissions to the metadata file.
- b) **Export permissions** - This option will export permissions based on the user specified options.

## CHAPTER 3 – Export SharePoint List contents using the browse option

The **Export Permissions** options appear as shown below:

SPListX Task Wizard - Sample Task

**Step Number: Permission Options (Works only for SharePoint 2010)**  
Export site / list / item permission from SharePoint file to the metadata file.

**Export Permissions:**

☐ Do not export permissions

☒ Export permissions

Export permissions for: ☒ Site ☒ List ☒ List item

Permission format:

☒ User - Role format (e.g., johndoe: Full Control)

☐ Role - User format (e.g., Full Control: johndoe)

Inheritance status:

☒ Export inheritance status as separate column (shows if the permission is Unique or Inherited)

Membership information:

☒ Export membership information and role definition to a separate XML file

< Back Next > Finish Cancel

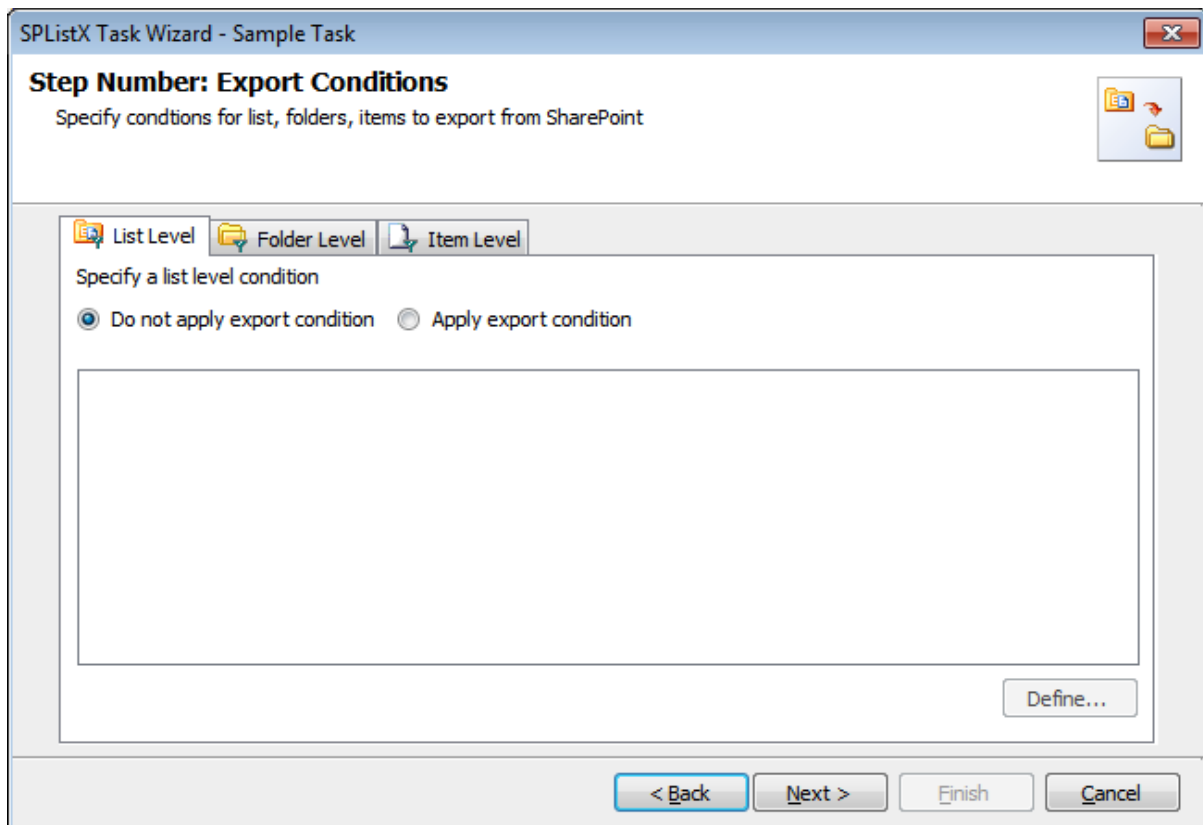
- 2) You can export permissions for **Site / List / List item** to the metadata file depending on the user selection. Check appropriate checkboxes in **Export permissions for:** options.
- 3) Specify the **Permission format** to use when exporting the permission information for the Site / List / List item to the metadata file using the options given below:
  - a) **User - Role format** – Exports permission details as User – Role e.g., johndoe: Full Control, Limited Access; johnsmith: Read, View Only etc.
  - b) **Role - User format** – Exports permission details as Role – User e.g., Full Control: johndoe, johnsmith; Contributor: janedoe etc.
- 4) **Inheritance status** - Export the inheritance status of the Site / List / List item as a separate column / field in the metadata file. This column / field indicate if the permission is 'Inherited or Unique' role assignment at the Site / List / List item level in SharePoint.
- 5) **Membership information** - This option exports membership and role definition information to separate XML files. These XML files are stored in the same location as the metadata files in the name `_membershipinformation` and `_roledefinition`. The user account that connects to SharePoint must have (System Account) permission to retrieve respective membership information. Similarly, the user account specified in Active Directory Profile Manager for each domain must have (Domain Admin) permission to retrieve respective membership information.
- 6) Click **Next** to Proceed.



### 3.8 Export Conditions

**SPListX** can export folders, files and list items including attachments from SharePoint list based on certain export conditions. The conditions can be created by using SharePoint columns in the source list.

1) The **Export Conditions** step appears as shown below:



2) You can specify export conditions at three levels:

- List Level
- Folder Level
- List Item Level

#### 3) List Level Conditions

Select *any one* of the following options given below:

- **Do not apply any conditions** - No conditions will be used to filter lists.
- **Apply the following conditions** - The conditions specified will be used to filter lists taken for export from source SharePoint List.

4) Click **Define** to specify the conditions

## CHAPTER 3 – Export SharePoint List contents using the browse option

The **List Export Conditions Dialog** appears as shown below:

The screenshot shows a dialog box titled "List Export Condition" with a close button (X) in the top right corner. Below the title bar, there is a text box containing the instruction: "Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export list only when [List Type' = 'Document Library']".

Below the instruction, there are three dropdown menus labeled "Field Name", "Operator", and "Value". Below these dropdowns are two buttons: "Add to Filter" and "'OR' to Filter".

Below the buttons, there is a section labeled "Conditions:" with a large empty text area for defining conditions. Above this text area are several icons: a left parenthesis '(', a right parenthesis ')', a double arrow '<=>', a double arrow '>=<', a double arrow '<=>', and a double arrow '>=<'. There is also a small icon of a notepad and pencil.

At the bottom of the dialog, there is a label "Export list items if the above condition is" followed by two radio buttons: "satisfied" (which is selected) and "not satisfied". Below the radio buttons are two buttons: "OK" and "Cancel".

- 5) You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =, <> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.

## CHAPTER 3 – Export SharePoint List contents using the browse option

**List Export Condition**

Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export list only when [List Type] = [Document Library].

Field Name: Base Type

Operator: =

Value: Document Library

'AND' to Filter    'OR' to Filter

Conditions:

( ) ✕ ✕ ✕ ✎

[Base Type] = 'Document Library'

Export list items if the above condition is ☒ satisfied ☐ not satisfied

OK Cancel

6) SPLiX will export the lists that satisfy the export condition or export the lists that do not satisfy the export condition depending on the option selected by the user:

- **Export list items if the above conditions are satisfied** - Lists that satisfy the condition will be marked for export.
- **Export list items if the above conditions are not satisfied** - Lists that do not satisfy the condition will be marked for export

### 7) Folder Level Conditions

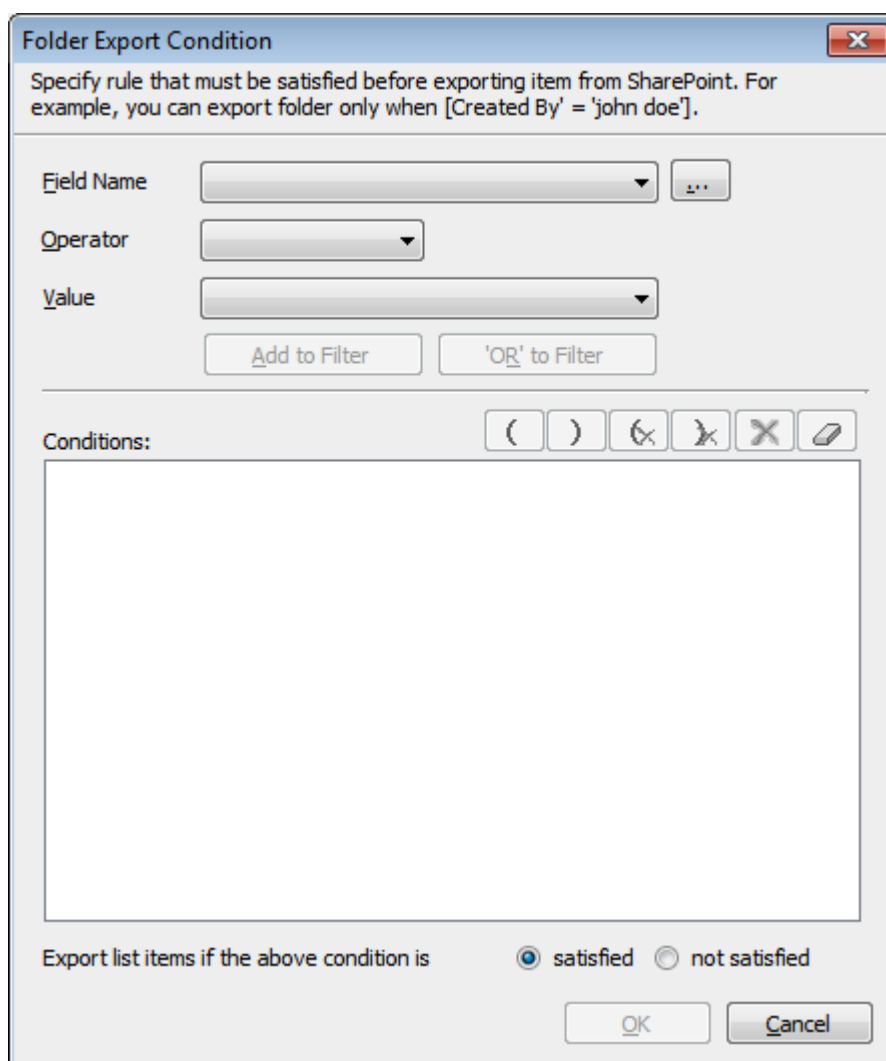
Select any one of the following options given below:

- **Do not apply any conditions** - No conditions will be used to filter folders.
- **Apply the following conditions** - The conditions specified will be used to filter folders taken for export from source SharePoint List.

## CHAPTER 3 – Export SharePoint List contents using the browse option

### 8) Click **Define** to specify the conditions

The **Folder Export Conditions Dialog** appears as shown below:



The screenshot shows the 'Folder Export Condition' dialog box. At the top, there is a title bar with a close button. Below the title bar, a text box explains the purpose: 'Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export folder only when [Created By' = 'john doe']'. The main area contains three dropdown menus: 'Field Name', 'Operator', and 'Value'. To the right of the 'Field Name' dropdown is a button with three dots (...). Below these dropdowns are two buttons: 'Add to Filter' and '"OR" to Filter'. A horizontal line separates this section from the 'Conditions:' section. The 'Conditions:' section has a toolbar with icons for parentheses, logical operators (AND, OR, NOT), and a delete icon. Below the toolbar is a large empty text area for defining conditions. At the bottom, there is a label 'Export list items if the above condition is' followed by two radio buttons: 'satisfied' (which is selected) and 'not satisfied'. At the very bottom are 'OK' and 'Cancel' buttons.

### 9) Click (...) button to add the SharePoint columns in **Field Name** dropdown.

## CHAPTER 3 – Export SharePoint List contents using the browse option

The **Add Fields Dialog** appears as shown below:

Column Name	Column Type
Destination	Text
Date of join	DateTime
Authorized by	User

Specify the *column name* in **Name** textbox and select the data type of the column in SharePoint from **Type** drop-down.

Click **Add** button to add the columns to the fieldname dropdown list.

Click **Remove** button to remove the columns from the fieldname dropdown list.

- 10)** You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =, <> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.

## CHAPTER 3 – Export SharePoint List contents using the browse option

**Folder Export Condition**

Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export folder only when [Created By] = 'john doe'.

Field Name: Created Date

Operator: <=

Value: 01-Jan -12

'AND' to Filter   'OR' to Filter

Conditions:

( ) ✕ ✕ ✕ 📝

[Created Date] <= #01-Jan-12#

Export list items if the above condition is ☒ satisfied ☐ not satisfied

OK Cancel

**11) SPListX** will export the folders that satisfy the export condition or export the folders that do not satisfy the export condition depending on the option selected by the user:

- **Export list items if the above conditions are satisfied** - Folders that satisfy the condition will be marked for export.
- **Export list items if the above conditions are not satisfied** - Folders that do not satisfy the condition will be marked for export.

### **12) List Item Level Conditions**

*Same as Folder Level Conditions*

**13) Click Next to proceed.**

## CHAPTER 3 – Export SharePoint List contents using the browse option

### Examples of Export Conditions

#### Examples

**SPListX** exports folders & files / attachments along with metadata to the file system location based on export conditions defined in the export task. Export conditions can be constructed using metadata columns and its values.

A few examples of list conditions are as follows:

Export Condition	Description
<b>[Server Relative URL] = '/site name/subsite name/lists/list name'</b>	Exports list items that have server relative URL as  '/site name/subsite name/lists/list name'  For example: [Server Relative URL] = '/vyapin/sharepoint/lists/Product List'
<b>[List Name] = 'Cities'</b>	Exports list item and attachments of lists named as 'Cities'
<b>[List Type] = 'Document Library'</b>	Exports documents from all document libraries in the entire web application.
<b>[Base Type] &lt;&gt; 'Document Library'</b>	Exports list items and attachments of all custom lists (other than document libraries) that are present in the entire web application.

A few examples of item and folder conditions are as follows:

Export Condition	Description
<b>[Modified Date] &gt; '09/09/2009'</b>	Assuming the date specified by the user is in MM/DD/YYYY format and with this condition, SPListX exports list items that have been modified after 9th September 2009.
<b>[Created By] = 'John Doe'</b>	Exports list items that have been created by 'John Doe'
<b>[Created Date] &gt;= #09/01/2010# AND [Created Date] &lt;= #09/30/2010#</b>	Assuming the date specified by the user is in MM/DD/YYYY format, SPListX exports list items created in the month of September 2010.

## CHAPTER 3 – Export SharePoint List contents using the browse option

**[Content Type] = 'Document'**

Exports list items that have content type as 'Document'

**[Modified By] = 'John Doe'**

Exports list items that have been modified by 'John Doe'

**[Item Relative Base URL] = '/My Folder'**

Exports list items that has relative URL as 'My Folder'

The following section describes the data types supported by SharePoint and an example of how to state the export condition.

SharePoint Data Type	Example	Description
Yes/No	[Document Verified] = 'Yes'	SPListX exports list items that have the 'Document Verified' value set to 'Yes'.
Text	[Title] <> 'Research'	SPListX exports only list items that do not have 'Research' as value for 'Title' field.
Date and Time	[Created Date] >= #09/01/2010# AND [Created Date] <= #09/30/2010#	Assuming date specified by the user is in MM/DD/YYYY format, SPListX exports list items created in the month of September 2010.
Number	[Product ID] > 10 OR [Product ID] <=100	SPListX exports list items that have 'Product ID' value lies in between 10 to 100.
Currency	[Product Cost] = 100	SPListX exports list items that have 'Product Cost' value equal to 100.
Choice	[City] = 'New York' [City] = 'London;Paris;Singapore'	Text or Number values can be given for this field. The values can be single or multiple. Multiple values should be separated by ';'. SPListX exports the list items that have 'City' column value set as 'London', 'Paris' and 'Singapore'.
Lookup	[Product Code] = 100 [Product Code] = 123ABC;154XYZ	The values can be single or multiple. Multiple values should be separated by ';'. SPListX exports the list items that have '123ABC' and '154XYZ' as value for 'Product Code' field.



## CHAPTER 3 – Export SharePoint List contents using the browse option

People or Group	[Document Reviewed by] ='John Doe'  [Document Reviewed by] ='John Doe; Jane Doe'	User or group values can be given for this field. The values can be single or multiple. Multiple values should be separated by ';'.  SPListX exports the list items that have 'Document Reviewed by' value set to 'John Doe' and 'Jane Doe'.
-----------------	--	--

### A Handy Operator

Apart from relational operators, SPListX allows you to construct flexible export conditions by using the Changed operator for periodic import for the fields 'Created Date (SharePoint)' and 'Modified Date (SharePoint)'. The following built-in values can be used for this operator:

**Today, Yesterday, This Week, This Month, Last Week, Last Month, Since Last Update in SharePoint, Since Last Migrate in SPListX, Last 7 days and Last 14 days.**

By using Changed operator, you can filter the list items based on the above mentioned values from SharePoint list.

For example, if you need to migrate list items that are modified in SharePoint today, you can specify a export condition as stated below:

#### [Modified Date] Changed [Today]

Operator & Value	Description	An Example	Result/Remarks
<b>Changed Today</b>	Exports list items that are created or modified in the present day (at the time of export) in SharePoint.	[Modified Date] Changed [Today]	SPListX compares the source list item's modified date value with the current day (at the time of export) and exports the list items which are modified on the current day.
<b>Changed Yesterday</b>	Exports list items that are created or modified in the current week.	[Modified Date] Changed [This Week]	SPListX checks the source list item's modified date value and exports the items that are changed in the current week.
<b>Changed This Week</b>	Exports list items that are created or modified in the current week.	[Modified Date] Changed [This Week]	SPListX checks the source list item's modified date value and exports the items that are changed in the current week.
<b>Changed This Month</b>	Exports list items that are created or	[Modified Date] Changed [This	SPListX checks the source list item's

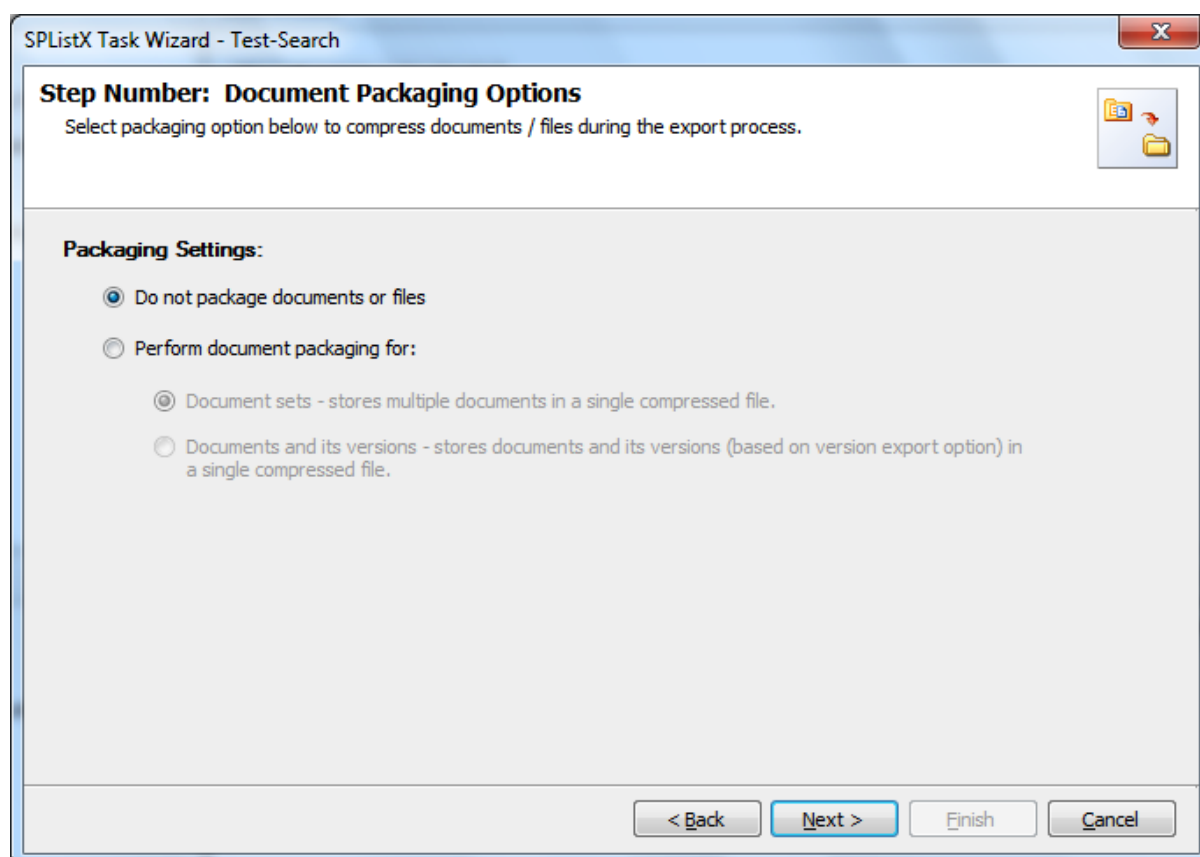
## CHAPTER 3 – Export SharePoint List contents using the browse option

	modified in the current month.	Month]	modified date value and exports the items that are changed in the current month. SPListX checks the source list item's created date value and exports those items that are changed in last (previous) week. SPListX checks the source list item's modified date value and exports those items that are changed in last (previous) month. SPListX compares the source list item's modified date value with list item's last import date and time maintained by the application and proceeds with the export accordingly.
<b>Changed Last Week</b>	Exports list items that are created or modified in the last week.	[Created Date] Changed [Last Week]	
<b>Changed Last Month</b>	Exports the list items that are created or modified in the last month.	[Modified Date] Changed [Last Month]	
<b>Changed Since Last Export using SPListX</b>	Exports list items that are modified in the source folder, since the last export using SPListX. It is based on the last 'Import date and time' value internally maintained for the list item in SPListX.	[Modified Date] Changed [Since Last Export using SPListX]	
<b>Changed Last 7 days</b>	Exports list items that are created or modified in the last 7 days.	[Modified Date] Changed [Last 7 days]	SPListX checks the source list item's modified date value and exports the items that are changed in the last 7 days. SPListX checks the source list item's modified date value and exports the items that are changed in the last 14 days.
<b>Changed Last 14 days</b>	Exports list items that are created or modified in the last 14 days.	[Modified Date] Changed [Last 14 days]	

### 3.9 Document Packaging Options

Document Packaging helps in storing related documents / contents together in a single file in compressed format. SPListX has the provision to export document sets and document / file versions as packaged contents grouped together. Follow the steps outlined below to store multiple document versions and document sets grouped together in the file system / file share.

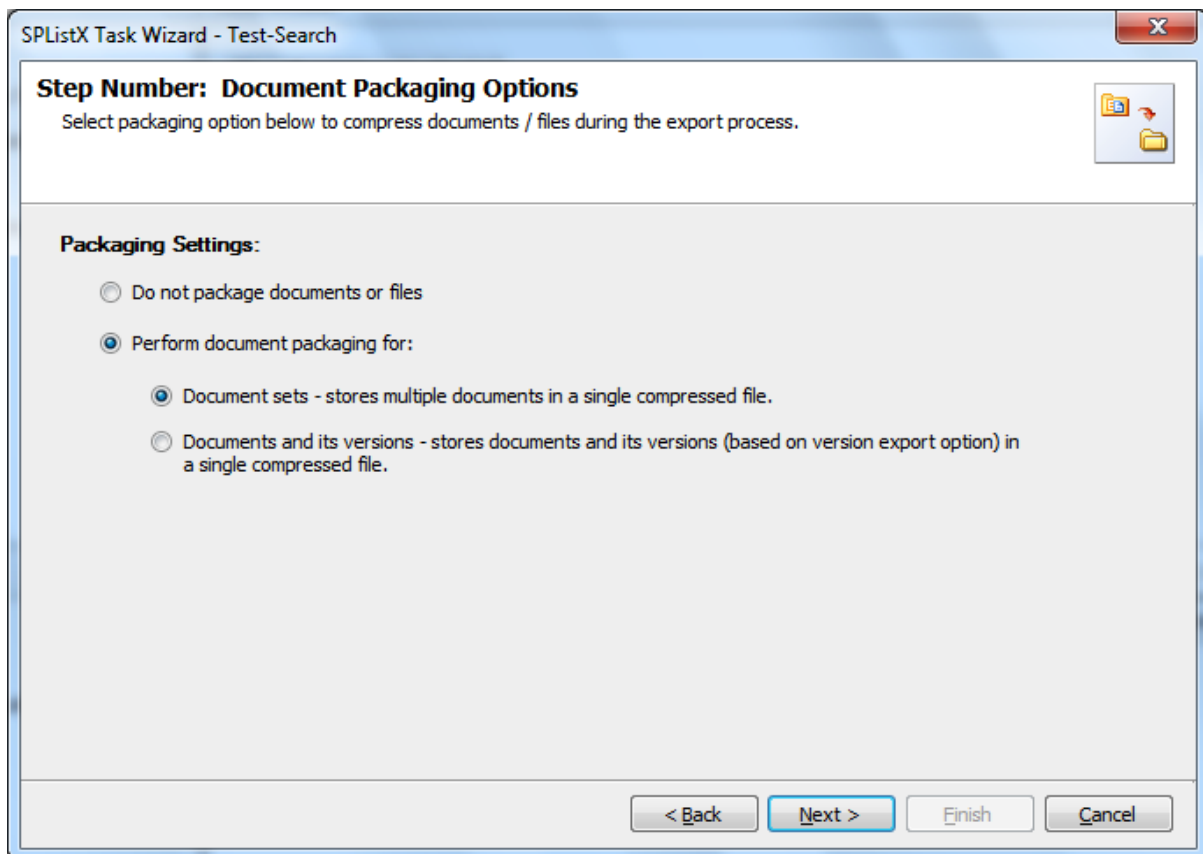
1) The **Document Packaging Options** step appears as shown below:



2) Select **Packaging Settings** from the options outlined below:

- a) **Do not package documents or files:** SPListX will not package the exported documents or files.
- b) **Perform document packaging for:** Document package will be created for each exported document set or file version based on the option selected below. If the file already exists in the package, **File Settings** options will be applied.

## CHAPTER 3 – Export SharePoint List contents using the browse option



- i. **Document sets** - This option will package all files stored in the document sets into a single compressed file. The package is created in the same name as the document set.
  - ii. **Documents and its versions** - This option will package the documents and its associated versions into a single compressed file. The package is created in the same name as original document or file. The document's versions are exported into the created package based on the settings specified in **Versions Settings** wizard step.
- 3) Click **Next** to Proceed.

### 3.10 Destination Folder Options

**SPListX** will create destination folders based on the following options given below:

- 1) The **Destination Folder options** specification wizard step appears as shown below:

**SPListX Task Wizard - Sample Task**

**Step Number: Destination Folder Options**  
Specify folders settings to use when creating folders in file system.

Do you want to create current timestamp folder under destination location? ☐ Yes ☒ No ⓘ

Do you want to create the top-level folder(s) included for export? ☒ Yes ☐ No ⓘ

Do you want to create destination folder path if it does not exist? ☒ Yes ☐ No ⓘ

Do you want to create a folder for the list or folder underneath, when its contents are empty? ☒ Yes ☐ No ⓘ

Do you want to create separate folder for storing attachments? ☒ Yes ☐ No ⓘ

Attachment Folder Tag:  ⓘ

< Back Next > Finish Cancel

- 2) Select from the following options:

- a) **Do you want to create current timestamp folder under destination location?** - This option creates timestamp folder under the specified destination location. This option may be useful when scheduling the export process or when repeated exporting contents to the same destination location. Select the appropriate option to create the timestamp folder by selecting the option (Yes/No).
- b) **Do you want to create top-level folder(s) included for export?** - The top-level folder is the folder added or specified for export by the user. SPListX will commence the export process from this top-level folder. Select the appropriate option to create the top-level folder by selecting the option (Yes/No).

## CHAPTER 3 – Export SharePoint List contents using the browse option

**c) Do you want to create destination folder path if it does not exist? -**

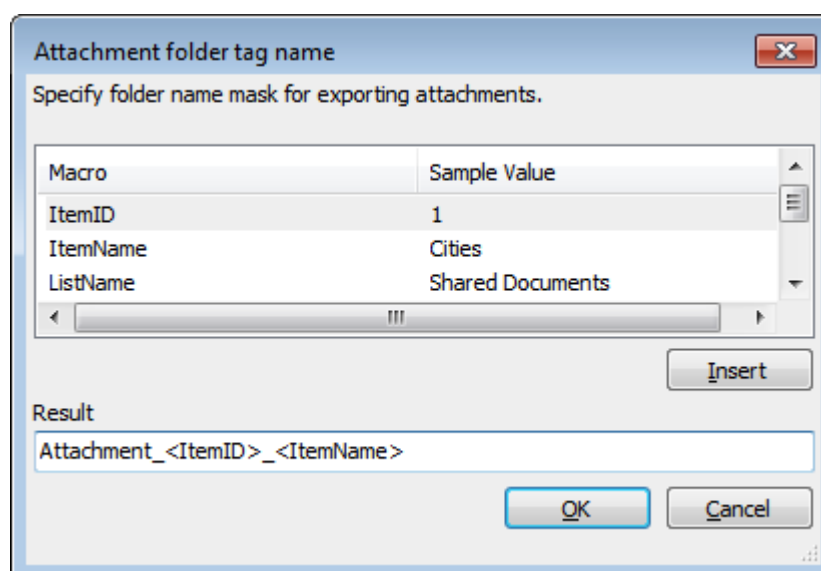
This option creates the full folder path in the destination location, if the specified path is not available in the specified location by selecting the option yes.

**d) Do you want to create a folder for the list or folder underneath, when its contents are empty? -** This option creates the folder in the destination location, if the source list or folder contents are empty. Select the appropriate option to create the folder by selecting the option (Yes/No).

**e) Do you want to create separate folder for storing attachments? -** This option creates separate folder for storing attachments under the specified destination location by selecting the option (yes/No).

- 3)** You can create separate folder for storing file attachments associated with list items. The folder / file naming option will be useful when list item attachments have the same name. You have the option to select an attachment folder or file naming convention to use when exporting list item attachments.

The attachment folder will be named based on the folder naming convention specified by the user. To select attachment folder naming mask, click the button placed next to the **attachment folder tag name** text box. This dialog appears as shown below:



Construct attachment folder name with the available mask provided in the dialog. Click **OK** to close the dialog. The constructed folder name mask will be placed in attachment folder naming tag textbox as shown below. Attachments will be exported to the resultant folder name mask value.

## CHAPTER 3 – Export SharePoint List contents using the browse option

The screenshot shows a Windows-style dialog box titled "SPListX Task Wizard - Sample Task". The main heading is "Step Number: Destination Folder Options" with a sub-instruction: "Specify folders settings to use when creating folders in file system." In the top right corner, there is an icon showing a folder with a red arrow pointing into it. The dialog contains five questions, each with "Yes" and "No" radio button options and an information icon (i) to the right:

- Do you want to create current timestamp folder under destination location? (Radio buttons: Yes, No; No is selected)
- Do you want to create the top-level folder(s) included for export? (Radio buttons: Yes, No; Yes is selected)
- Do you want to create destination folder path if it does not exist? (Radio buttons: Yes, No; Yes is selected)
- Do you want to create a folder for the list or folder underneath, when its contents are empty? (Radio buttons: Yes, No; Yes is selected)
- Do you want to create separate folder for storing attachments? (Radio buttons: Yes, No; Yes is selected)

Below these questions is a text field labeled "Attachment Folder Tag:" containing the text "Attachment\_<ItemID>\_<ItemName>". To the right of the text field is a browse button (three dots) and an information icon (i). At the bottom of the dialog, there are four buttons: "< Back" (highlighted in blue), "Next >", "Finish", and "Cancel".

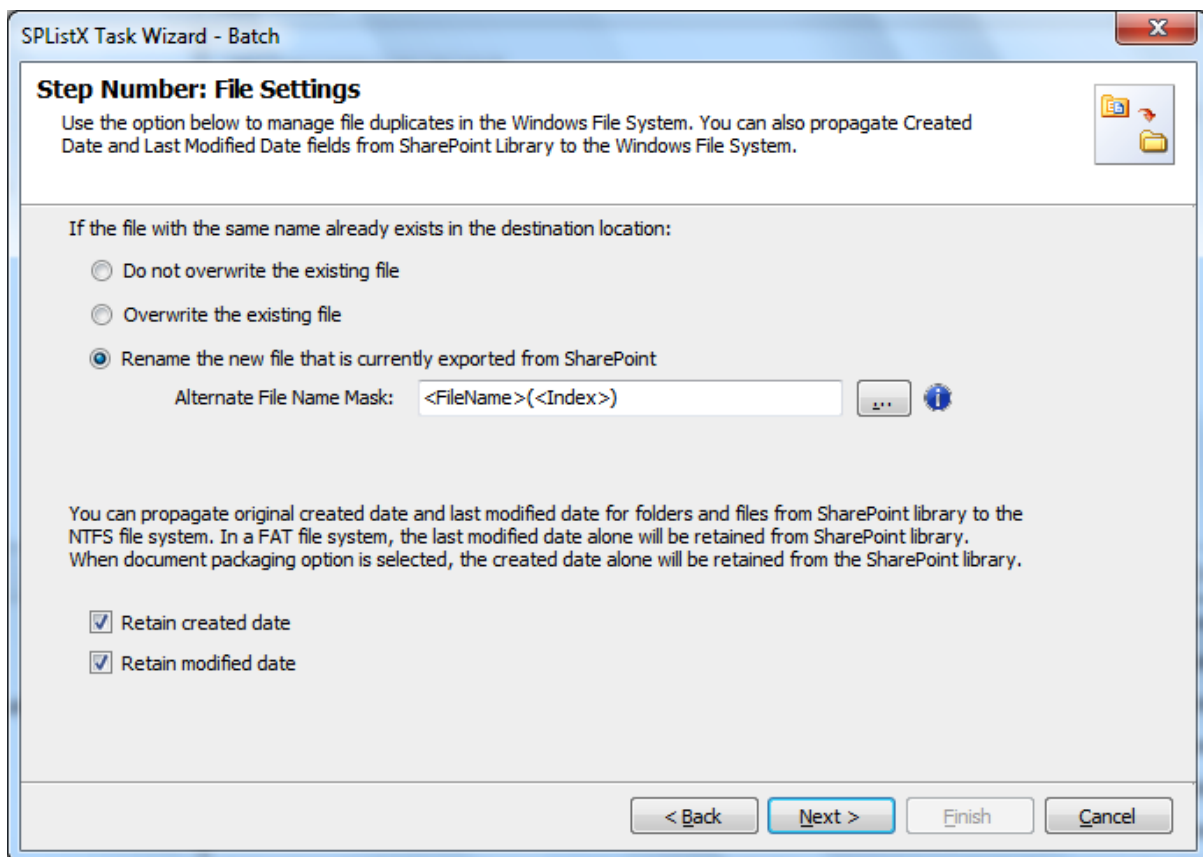
4) Click **Next** to proceed.

### 3.11 File Settings

To construct **Alternate File Mask** and to propagate Created Date and Modified Date from SharePoint Library to Windows File System, use below options:

#### 1) Alternate File Name Mask

If the file with the same name already exists in the destination location, follow the steps outlined below:



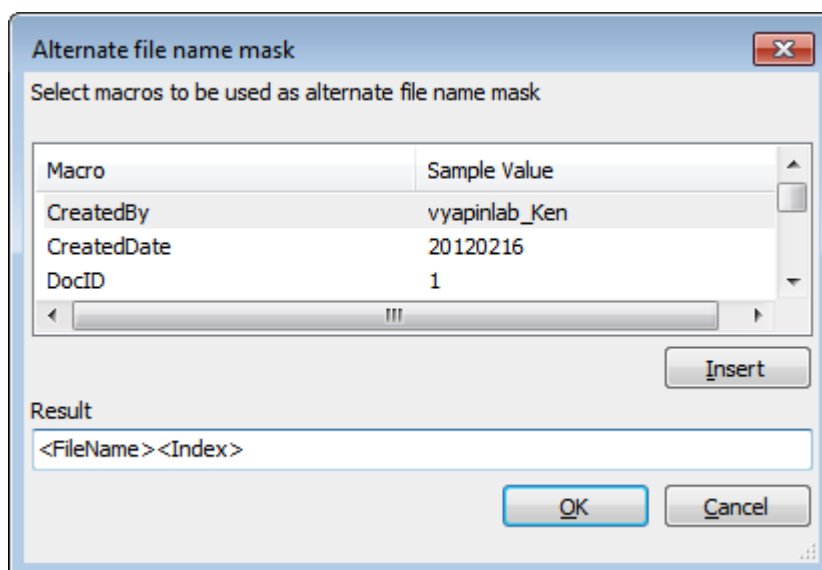
- a) **Do not overwrite the existing file** - Skips the file without overwriting the existing file with the same name.
- b) **Overwrite the existing file** - Deletes the file from the destination location and exports the current source file.
- c) **Rename the new file that is currently exported from SharePoint** - Rename the file based on the file name mask specified in the Alternate File Name Mask text box.

To select alternate file naming mask, click the alternate file name mask button placed next to the alternate file name mask textbox.



## CHAPTER 3 – Export SharePoint List contents using the browse option

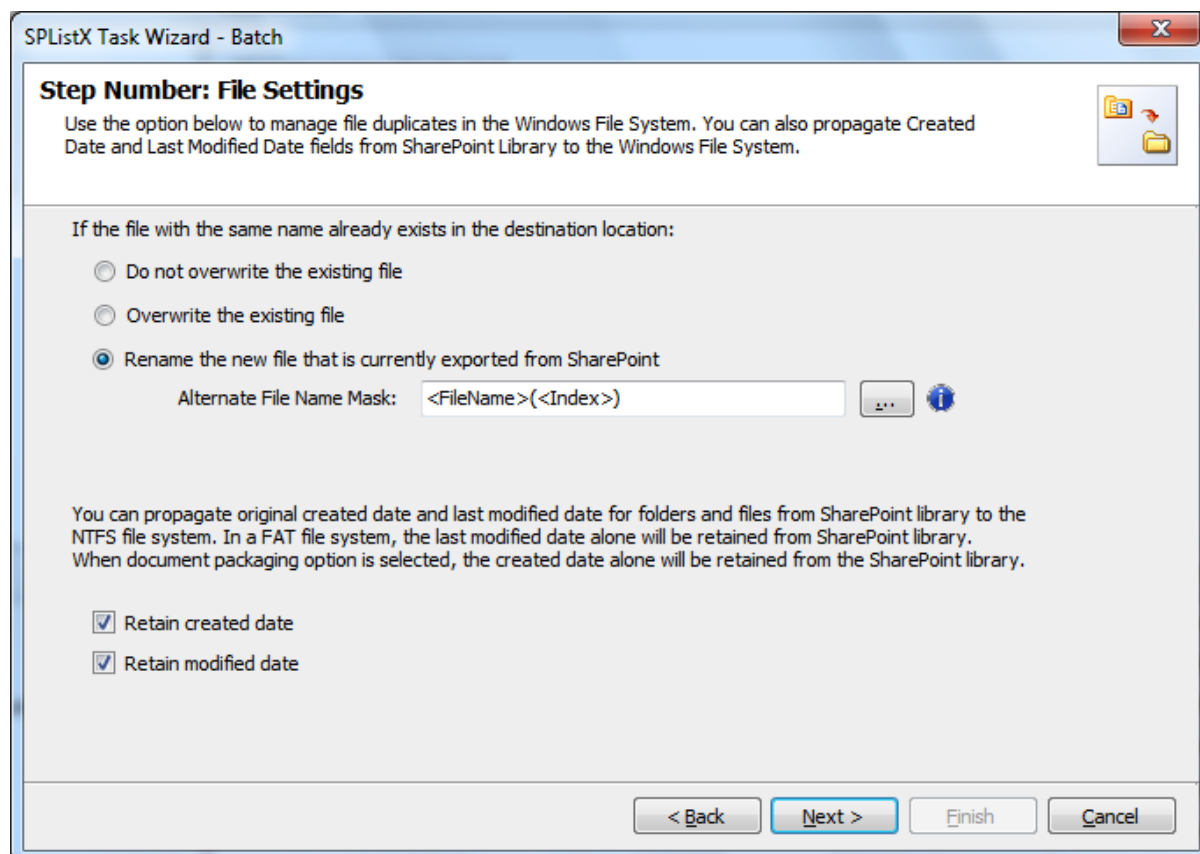
**Alternate file name mask** *dialog* appears as shown below:



Construct alternate file naming mask with the available macros provided in the dialog. Click **OK** to close the dialog. The new files will be exported in the name format / syntax entered in the file naming mask.

### 2) File System Date Settings:

To propagate the system date fields - Created Date and Last Modified Date to respective folders and files in the file system, follow the steps outlined below:



## CHAPTER 3 – Export SharePoint List contents using the browse option

Select File System Date Settings:

The date options given below will assign the respective data field values in the file system as in the original SharePoint list.

- a) Retain created date** - Carry forward / propagate Created Date field from the source folders, files and list item attachments to the Windows file system.
- b) Retain modified date** - Carry forward / propagate Last Modified Date field from the source folders, files and list item attachments to the Windows file system.

**NOTE:** You can propagate original Created Date and Last Modified Date for folders and files to the NTFS file system. In a FAT file system, the Last Modified Date alone will be retained as in source.

- 3) Click *Next*** to Proceed.

### 3.12 Metadata File Settings

**SPListX** will create metadata files based on the following options given below:

- 1) The **Metadata File Settings** step appears as shown below:

**SPListX Task Wizard - Sample Task**

**Step Number: Metadata File Settings**  
Specify destination path to store metadata file and export file format (CSV/XLSX/XML)

Metadata file name & location:

- ☒ Store metadata file(s) in this location: C:\Users\Public\Documents\SPListX ... XLSX ▼
- ☐ Store metadata file(s) in  format in the respective list folder location

If file already exists?

- ☒ Append metadata file
- ☐ Overwrite metadata file
- ☐ Tag timestamp with filename

New header names: (Optional)

Column Name	Header Name
Source URL	Source URL
Version Number	Version Number

Edit...

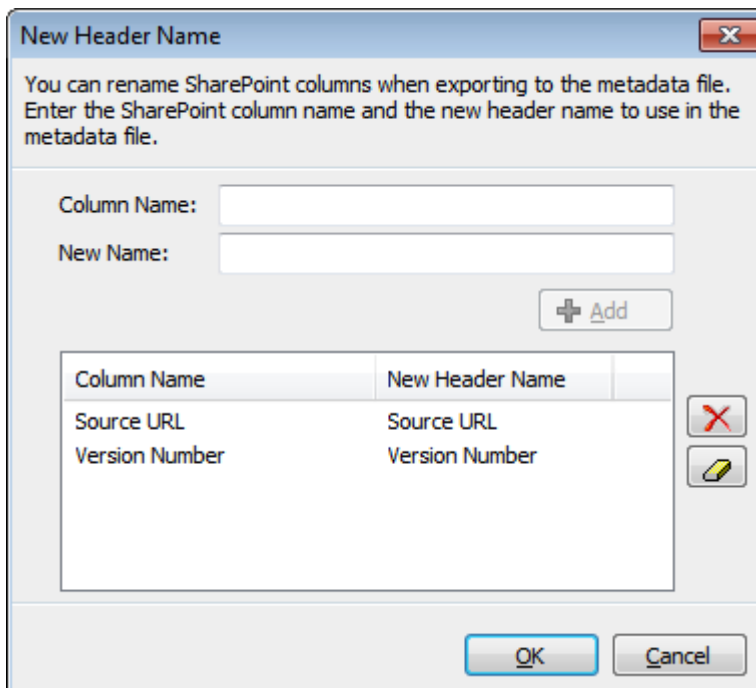
< Back Next > Finish Cancel

- 2) **SPListX** creates the metadata file using the List name and List GUID in the format - List Name (List GUID) to maintain a unique metadata file name.
- 3) Specify the **Metadata filename & location** using the options below:
  - a) **Store metadata file(s) in this location:** Specify a folder path where the selected list items metadata are to be exported. You can also *click* **browse** ('...') button to launch folder browser dialog.
  - b) **Store metadata file(s) in the respective list folder location:** This option will export the metadata file in the selected file format into the respective list folder locations where the physical documents/ files are exported.

**NOTE:** Ensure that the user context used to run the SPListX export process has sufficient permissions to create, edit and delete folders and files in the specified export path.

## CHAPTER 3 – Export SharePoint List contents using the browse option

- 4) If the metadata file already exists in the destination location, choose from any one of the following options:
- a) **Append:** This option will append the new metadata in the existing metadata file.
  - b) **Overwrite:** This option will overwrite the existing metadata file.
  - c) **Tag timestamp with file name:** This option will create a new metadata file tagged with a timestamp for each export.
- 5) You can specify new column names to use when generating the metadata file in the file system location. To use this feature, specify the new header names by clicking the Edit button. A New Header Dialog appears as shown below:



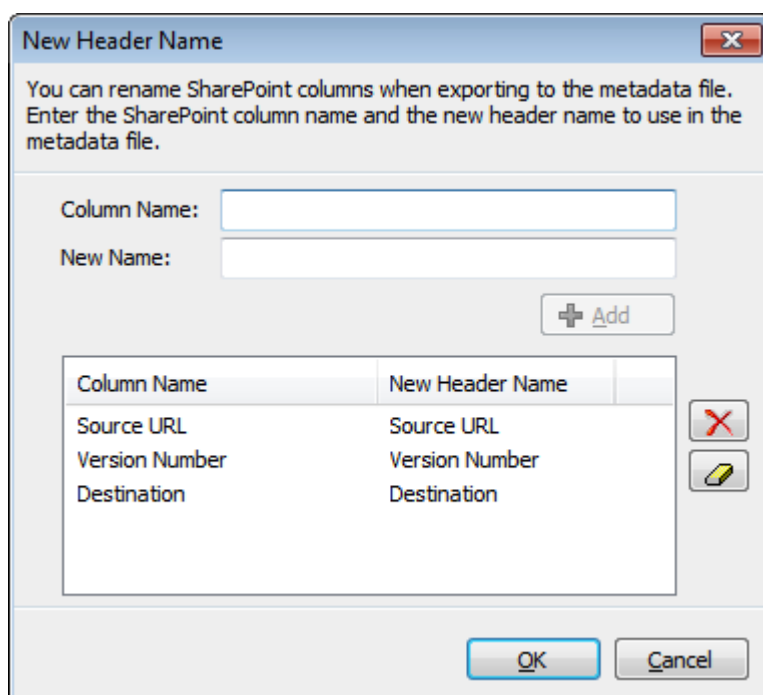
The dialog box is titled "New Header Name" and contains the following elements:

- A close button (X) in the top right corner.
- Instructional text: "You can rename SharePoint columns when exporting to the metadata file. Enter the SharePoint column name and the new header name to use in the metadata file."
- Two text input fields: "Column Name:" and "New Name:".
- An "+ Add" button to the right of the input fields.
- A table with two columns: "Column Name" and "New Header Name".
- Buttons for deleting (X) and editing (pencil) rows in the table.
- "OK" and "Cancel" buttons at the bottom.

Column Name	New Header Name
Source URL	Source URL
Version Number	Version Number

- 6) You can specify SharePoint **column name** in the **Column Name** textbox and a new field name to use in the **New Name** textbox. Click **OK**. For example, a SharePoint column named 'Department' in the source SharePoint list can be renamed as 'Location' when creating the metadata files during the export operation.

## CHAPTER 3 – Export SharePoint List contents using the browse option



7) Click **Next** to proceed.

### **XML File Format:**

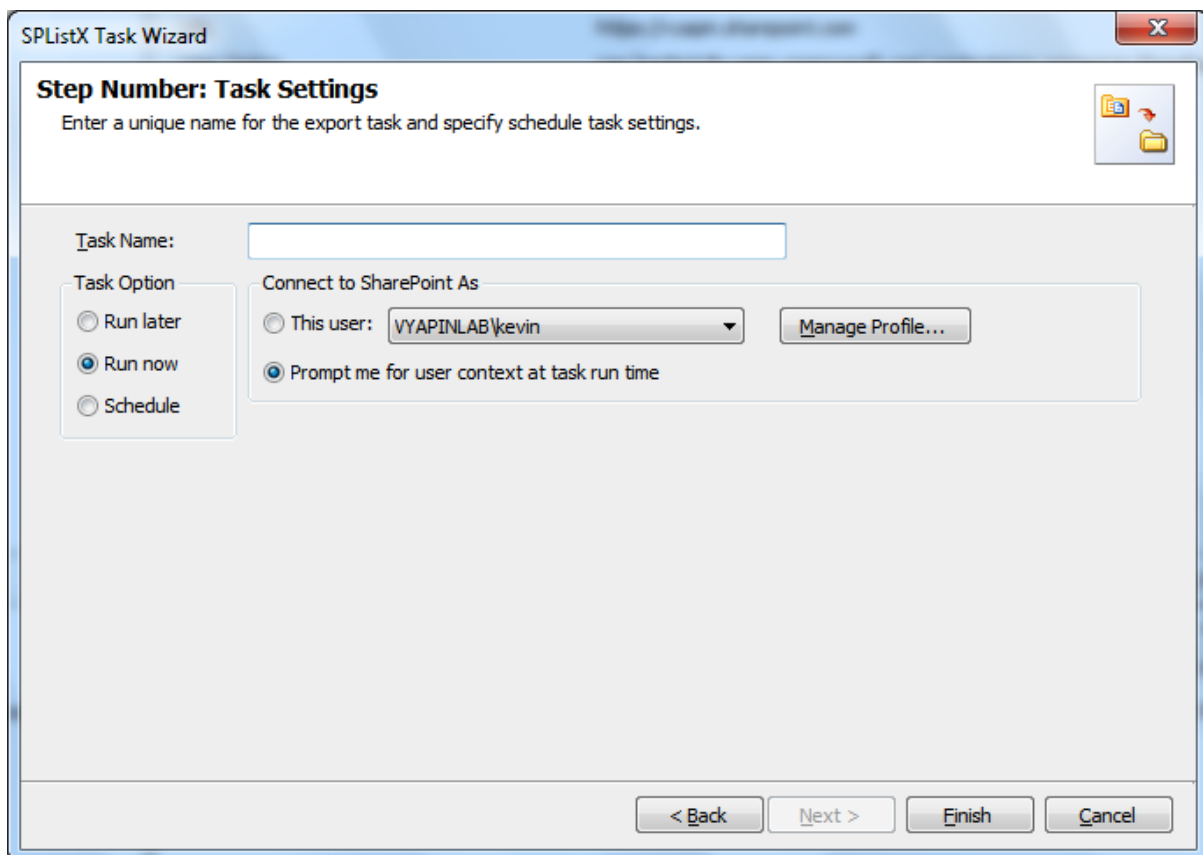
SPListX uses Document Type Definition (DTD) syntax to define the document structure of the XML metadata file. This declaration has been introduced primarily to support large XML metadata files, minimize memory footprint when working with large XML files and improve metadata file throughput.

XML metadata files are split into multiple text files and stored in a folder location that is constructed using the list name and its corresponding GUID. An XML file is created using the metadata filename specified by the user in the stated metadata file location. When you click the XML file, the text files in the folder are re-grouped using the DTD file to form a single XML file.

### 3.13 Task Settings

To specify the task name and schedule settings, follow the instructions given below. Please note that the task options will change depending on whether you are using Windows / Forms authentication or Web Single Sign-on credentials to connect to SharePoint.

1) The **Task Settings** step appears as shown below:



2) Enter a unique task name in **Task Name** textbox.

3) Select a **Task Option** from one of the following options:

- a) **Run later** - to run the task later as and when desired
- b) **Run now** - to run the task immediately after clicking *Finish* button
- c) **Schedule** -to create a Windows scheduled task. SPListX will create a schedule task in the Windows Scheduled Tasks applet with the stated settings. SPListX will perform the export based on the *Run As* user account specified in this export wizard step. The *Run As* account should be a valid Windows domain account.

## CHAPTER 3 – Export SharePoint List contents using the browse option

**SPListX Task Wizard**

**Step Number: Task Settings**  
Enter a unique name for the export task and specify schedule task settings.

**Task Name:** Sample Task

**Task Option**

- ☐ Run later
- ☐ Run now
- ☒ Schedule

**Connect to SharePoint As**

- ☐ This user: VYAPINLAB\kevin [Manage Profile...](#)
- ☒ Use 'Run As' user context given below

**Schedule Settings**

**Run As:** VYAPINLAB\Administrator [Set Password...](#)

**Schedule:** Daily **Start time:** 18:32 [Advanced...](#)

**Schedule Task Daily**

Every 1 day(s)

At 18:32 every day, starting 08-05-2012

[< Back](#) [Next >](#) [Finish](#) [Cancel](#)

In scheduled export process, SPListX allows the user to enter different user credentials to connect to SharePoint and to create a scheduled export task (unattended mode).

By default, SPListX will use the user account specified in the scheduled 'Run As' user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint when running the scheduled task, you can do so by storing the SharePoint user context for future use.

SPListX will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords / Credential Manager applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you will not be allowed to change the scheduled 'Run As' user context for the export task.

Click **Manage Profile** button to create new user profile.

- 5) As for **Web Single Sign-on** credential based export task, the task settings will be shown as below:

## CHAPTER 3 – Export SharePoint List contents using the browse option

SPListX Task Wizard

**Step Number: Task Settings**

Enter a unique name for the export task and specify schedule task settings.

Task Name:

Task Option

☐ Run later

☒ Run now

☐ Schedule

Connect to SharePoint As

☐ This user:  

☒ Prompt me for user context at task run time

< Back   Next >   Finish   Cancel

The Web Single Sign-on framework expects the user name and password to be given by user interactively in a browser based login dialog. Hence, the user profile list is not accessible for this type of connection.

- 6) As far as scheduled run is concerned, SPListX enables you to setup the export task using persistent connection and shared credential as shown below:



## CHAPTER 3 – Export SharePoint List contents using the browse option

**SPListX Task Wizard**

**Step Number: Task Settings**  
Enter a unique name for the export task and specify schedule task settings.

**Task Name:** Sample Task (Office365)

**Task Option**

- ☐ Run later
- ☐ Run now
- ☒ Schedule

**Connect to SharePoint As**

- ☐ This user:
- ☒ Use persistent session of the target site. [Check session status in Web SSO Dashboard](#)

**Schedule Settings**

**Run As:** VYAPINLAB\kevin

**Schedule:** Daily  **Start time:** 18:32

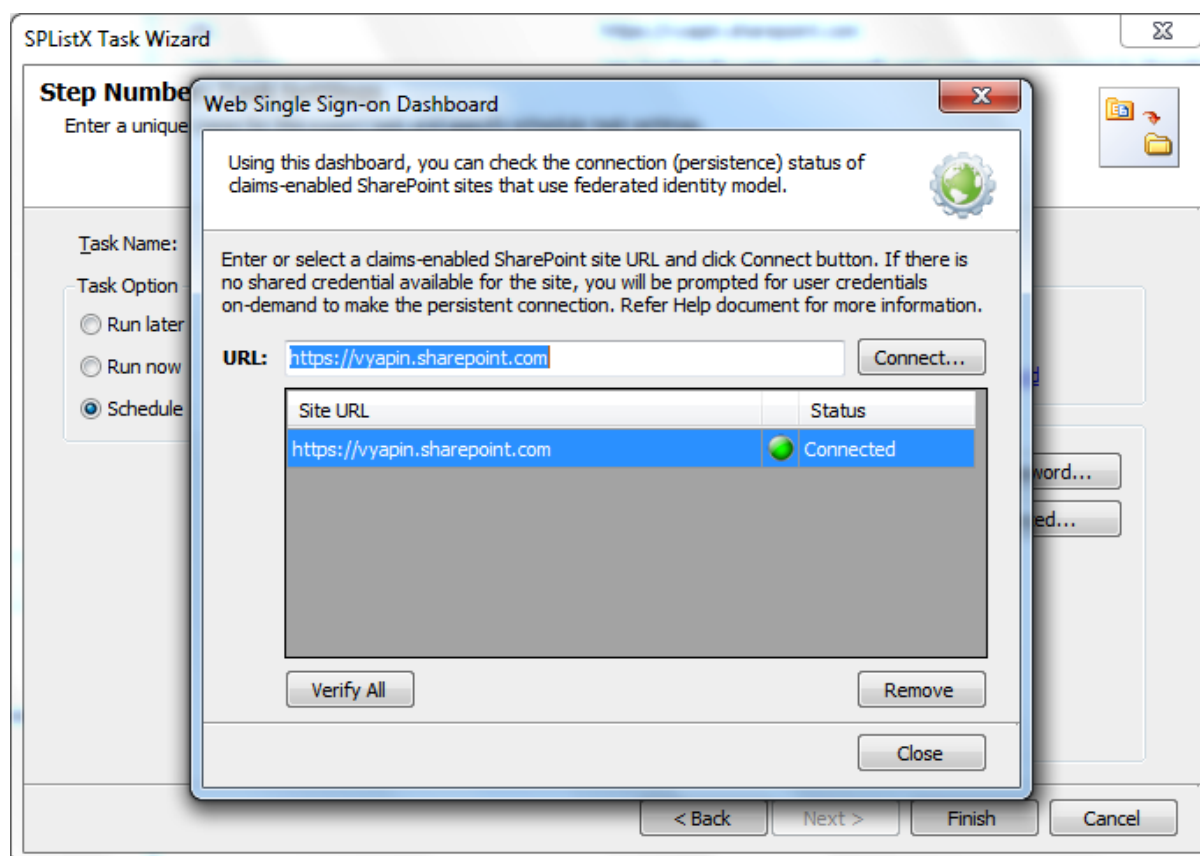
**Schedule Task Daily**

Every 1 day(s)

At 18:32 every day, starting 08-05-2012

- 7) SPListX expects the user must ensure the persistent connectivity status using Web Single Sign-on dashboard. To check the status, click **Web SSO Dashboard** hyperlink.

## CHAPTER 3 – Export SharePoint List contents using the browse option



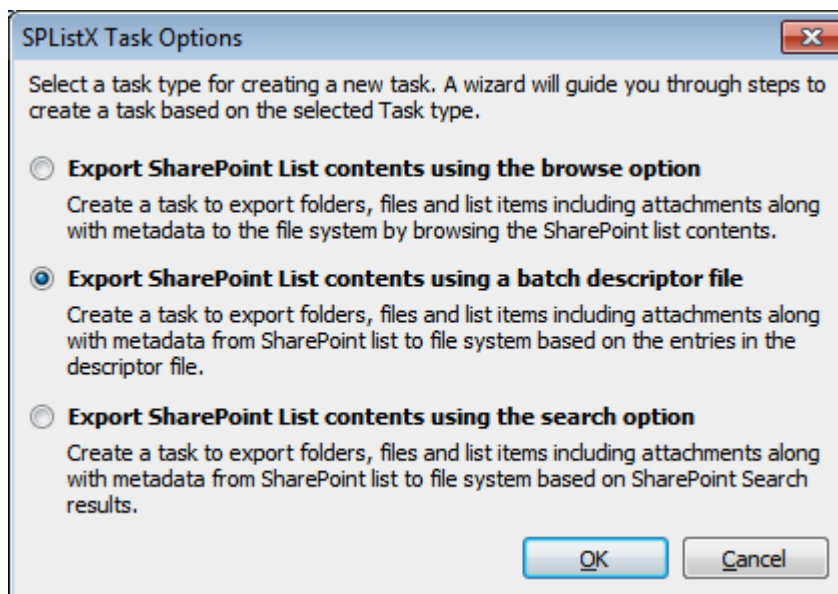
8) Click **Finish** button to create the task.

## 4 Export SharePoint List contents using a batch descriptor file

### 4.1 Create Task

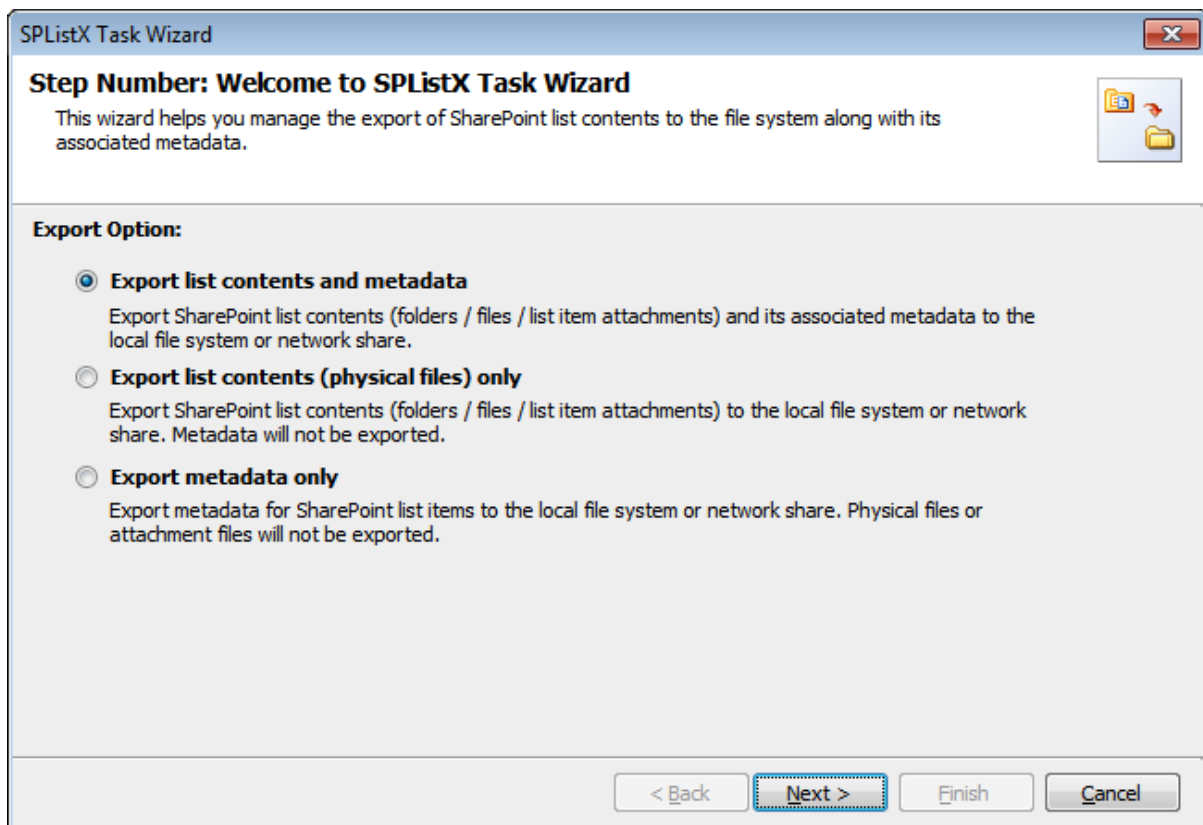
Create a task to export folders / files along with their list metadata from SharePoint Library to file system or network share based on the entries in the descriptor file. SPListX will process the files in the order in which they appear in the batch descriptor file.

- 1) **Select Export files and metadata using a batch descriptor file option in SPListX Task Options dialog as shown below and click OK.**



## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

### 2) The SPListX Task Wizard appears



3) Click **Next** button

4) Specify **Batch Descriptor File**

5) Specify **List View Options**

6) Specify **Version Options**

7) Specify **Permission Options**

8) Specify **Export Conditions**

9) Specify **Document Packaging Options**

10) Specify **Destination Folder Option**

11) Specify **File Settings**

12) Specify **Metadata File Settings**

13) Specify **Task Settings**

14) Click **Finish** button to create the Task, or click **Back** button to change any task settings.

### 4.2 Create Batch Descriptor File

---

The following section gives you the guidelines to create an external batch descriptor file for **Export SharePoint List contents using a batch descriptor file** task type.

- 1) The first row of the metadata file should contain the Field Names as headers.
- 2) The first field should be named as '**Path**' and second field should be named as '**Destination Path**'.

The other field names should be separated by a delimiter character such as comma (,), semi-colon (;) etc. The delimiter character used in the external metadata file should be same as 'List Separator' defined in locale settings in 'Regional and Language Options' in Control Panel and 'Format' string value available in the registry key:

(HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	Equivalent Format String
, (Comma)	CSV Delimited
; (Semi-colon)	Delimited (;)
*(asterisk)	Delimited (*)

- 3) The first column of all the rows should contain the source URL of the list or folder or file or folder or list item. In other words, the source path should be either a SharePoint List URL (e.g., <http://vyapin/Shared Documents>) or sub-folder URL within SharePoint List (e.g., <http://vyapin/Shared Documents/sample folder1>) or file URL within the SharePoint List (e.g., <http://vyapin/shared documents/sample folder1/SampleDocument.doc>) or list item URL within the SharePoint List (e.g., [http://vyapin/lists/cities/1\\_.000](http://vyapin/lists/cities/1_.000))
- 4) Use wildcard representations (\*, and \*.\* ) in order to export the list items from the source SharePoint list. Please see wildcard characters usage for this purpose:

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

Wildcard characters	Example	Description
.*	http://sharepoint/lists/Cities/.*	Exports all items from the source SharePoint list.
*.*(default)	http://sharepoint/shared documents/*.*	Exports all items and folders from the source SharePoint list.
.	http://sharepoint/lists/tasks/.	Exports list items available in the top level folders only.
*	http://sharepoint/lists/custom list/*	Exports folder structure only.

**NOTE:** For list items folder traversal option is not applicable.

- 5) The second column of all the rows should contain the destination folder location e.g., "C:\My Projects\" (or) \\FileServer\My Documents, where the exported item is to be stored.
- 6) Be consistent with the drive letters and UNC path when exporting folders, files and list item attachments from a SharePoint list. If you use local / mapped drives to export files or list item attachments, ensure the 'Destination Path' field has the corresponding local / mapped drive path (e.g., M:\My Documents). If you use shares to export file or list item attachments, ensure the 'Destination Path' field has the corresponding UNC path (e.g., \\Machine\_ Name\Share\_ Name).
- 7) For CSV and TXT formats, all field names and their corresponding metadata values should be enclosed within double quotes (") e.g., "http://vyapin/Shared Documents/sample folder1". When using accent characters such as [á é í ó] in folder / file names, the CSV / TXT metadata file must be in UNICODE encoded format.
- 8) For Microsoft Excel file formats (XLSX), you do not have to enclose the field names and their corresponding values within double quotes.

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

### Sample format of a CSV / TEXT batch descriptor file:

**NOTE:** Refer Point #2 for the separator to be used in the batch descriptor file

"Path", "Destination Path"

"http://vyapin/shared documents/Sample Brochure.doc", "C:\My Documents"

"http://vyapin/shared documents/sample folder1/\*", "\\vyapinfs\ExportDocs\shared doc contents"

"http://vyapin/lists/\*.\*", "C:\My Sales\Lists Backup"

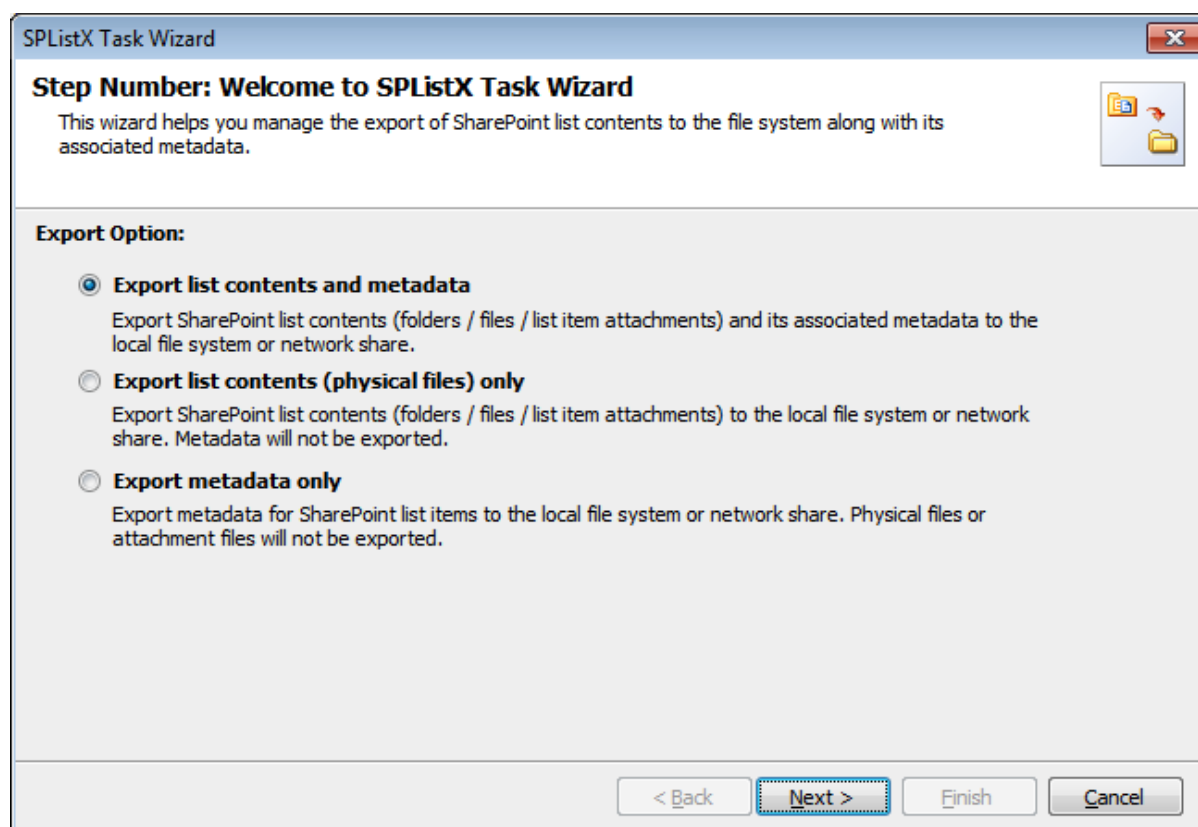
"http://Vyapin/lists/cities/\*.\*", "C:\My Cities\Backup"

### 4.3 Export Options

You can create a task to export folders / files / list items including attachments along with their metadata from SharePoint List to file system or network share. The export task enables users to select the export options in order to specify his requirements.

- A. Export list contents and metadata:** Export SharePoint list contents (folders/files/list item attachments) and its associated metadata to the local file system or network share.
- B. Export list contents (physical files) only:** Export SharePoint list contents (folders/files/list item attachments) to the local file system or network share. Metadata will not be exported.
- C. Export metadata only:** Export metadata for SharePoint list contents to the local file system or network share. Physical files or attachment files will not be exported.

1) The **Export Options** step appears as shown below:



Select the required export options. The wizard guides you with the steps accordingly.



### 4.4 Batch descriptor file

You can create a SPListX export task using a batch descriptor file that states the folders and list items to export from the SharePoint list along with the destination file system location to store the exported item. SPListX will export the folders, list items and associated metadata based on the sequential entries in the batch descriptor file.

1) The **Batch descriptor file** specification step appears as shown below:

**SPListX Task Wizard**

**Step Number: Batch descriptor file**

Specify batch descriptor file to use in order to export folders / list items and its associated metadata to the local file system or network share. Specify user credential to connect to SharePoint when running the export task.

File Name:  ... ?

Sheet Name:  ... View... Clear

**SharePoint user credential:**


☒ **Use the following credential to connect to SharePoint**  
Connect to SharePoint using the specified user credentials. SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

User Name:  ...  
(johndoe@contoso.com, contoso\johndoe, johndoe)

Password:

☐ **Use Web Single Sign-on credential to connect to SharePoint**  
Connect to SharePoint sites configured with ADFS as identity provider (including Office365)

< Back Next > Finish Cancel

- 2) Click (...) button to select the batch descriptor file. The descriptor file can be in any one of the following file formats - Comma delimited (**CSV**), Microsoft Excel (**XLSX**) or Text file (**TXT**).
- 3) Click  to see a sample batch descriptor file (such as, Comma delimited (**CSV**) file, MS-Excel (**XLSX**)).
- 4) The batch descriptor file will automatically be extracted once the file name is specified. If you are using Microsoft Excel based file format, then select the sheet name to use from the drop-down.
- 5) Click (...) to add a hidden sheet name of the Excel file from the drop down.

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

- 6) Specify the user's credentials to connect to the SharePoint URLs provided in the batch descriptor file above using the options given below:
- a) **Use the following credential** - Connect to SharePoint URL using the user context stored in the user profile (OR) Enter the user name in any ONE of the following formats: **<DOMAIN NAME>\<USER NAME>,UserName@DomainName, UserName** and its corresponding password. SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.
  - b) **Use Web Single Sign-on credential to connect to SharePoint** - Connect to SharePoint URL using federated identity configured using ADFS. Use this option to connect to Office365 SharePoint Online configured using federated identity provider.

**SPListX Task Wizard**

**Step Number: Batch descriptor file**

Specify batch descriptor file to use in order to export folders / list items and its associated metadata to the local file system or network share. Specify user credential to connect to SharePoint when running the export task.

File Name: C:\Users\Public\Documents\SPListX\Batch File.csv

Sheet Name: [Dropdown] [View...] [Clear] 29 row(s)

**SharePoint user credential:**

☒ **Use the following credential to connect to SharePoint**  
Connect to SharePoint using the specified user credentials. SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

User Name: VYAPINLAB\kevin  
(johndoe@contoso.com, contoso\johndoe, johndoe)

Password: [Masked]

☐ **Use Web Single Sign-on credential to connect to SharePoint**  
Connect to SharePoint sites configured with ADFS as identity provider (including Office365)

< Back Next > Finish Cancel

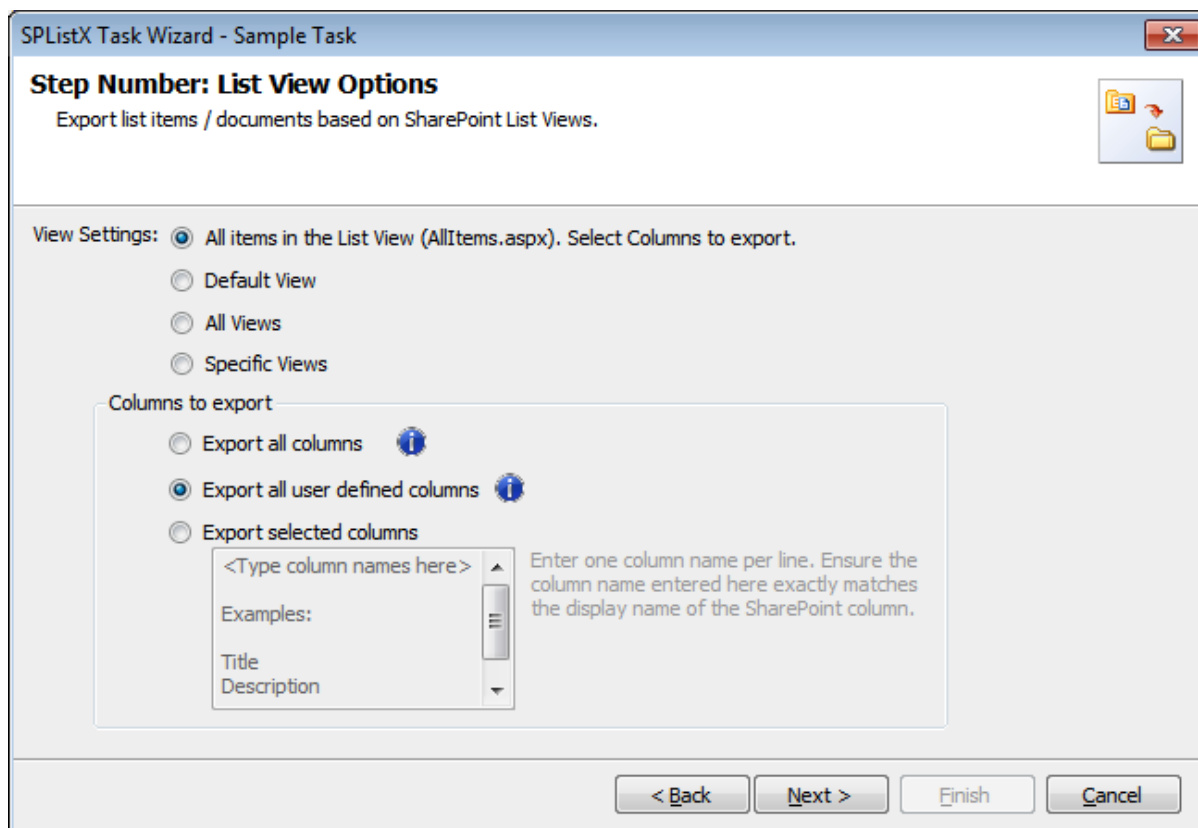
- 7) Click **Next** to Proceed

### 4.5 List View Options

You can export list items or documents based on SharePoint List views and thereby specify the SharePoint columns to export metadata.

To selectively export SharePoint Views from the list / library, follow the steps outlined below:

1) The **List View Options** wizard step appears as shown below:



The screenshot shows a window titled "SPListX Task Wizard - Sample Task". The main heading is "Step Number: List View Options" with the subtitle "Export list items / documents based on SharePoint List Views." Below this, under "View Settings:", there are four radio button options: "All items in the List View (AllItems.aspx). Select Columns to export." (which is selected), "Default View", "All Views", and "Specific Views". Under "Columns to export", there are three radio button options: "Export all columns" (with an information icon), "Export all user defined columns" (which is selected and has an information icon), and "Export selected columns". Below "Export selected columns" is a text box with the placeholder "<Type column names here>" and a list of examples: "Title" and "Description". To the right of this text box is a note: "Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column." At the bottom of the window are four buttons: "< Back", "Next >", "Finish", and "Cancel".

2) Select any one of the following **View Settings** given below:

a) **All items in the List View (AllItems.aspx). Select Columns to export.**

Export all items / documents (including folders) in the list view as it appears in AllItems.aspx web page corresponding to the list. You have the additional option to specify the SharePoint columns to export as per the options below:

- i. **Export all columns** - Exports all columns available in the source SharePoint list, including built-in SharePoint columns such as Created, Modified, Approval Status, etc.
- ii. **Export all user defined columns** - Exports all columns that are created by a SharePoint user.

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

- iii. **Export selected columns** - Exports columns that are specified in the textbox.

SPListX Task Wizard - Sample Task

**Step Number: List View Options**  
Export list items / documents based on SharePoint List Views.

View Settings: ☒ All items in the List View (AllItems.aspx). Select Columns to export.  
☐ Default View  
☐ All Views  
☐ Specific Views

Columns to export

☐ Export all columns   
☐ Export all user defined columns   
☒ Export selected columns

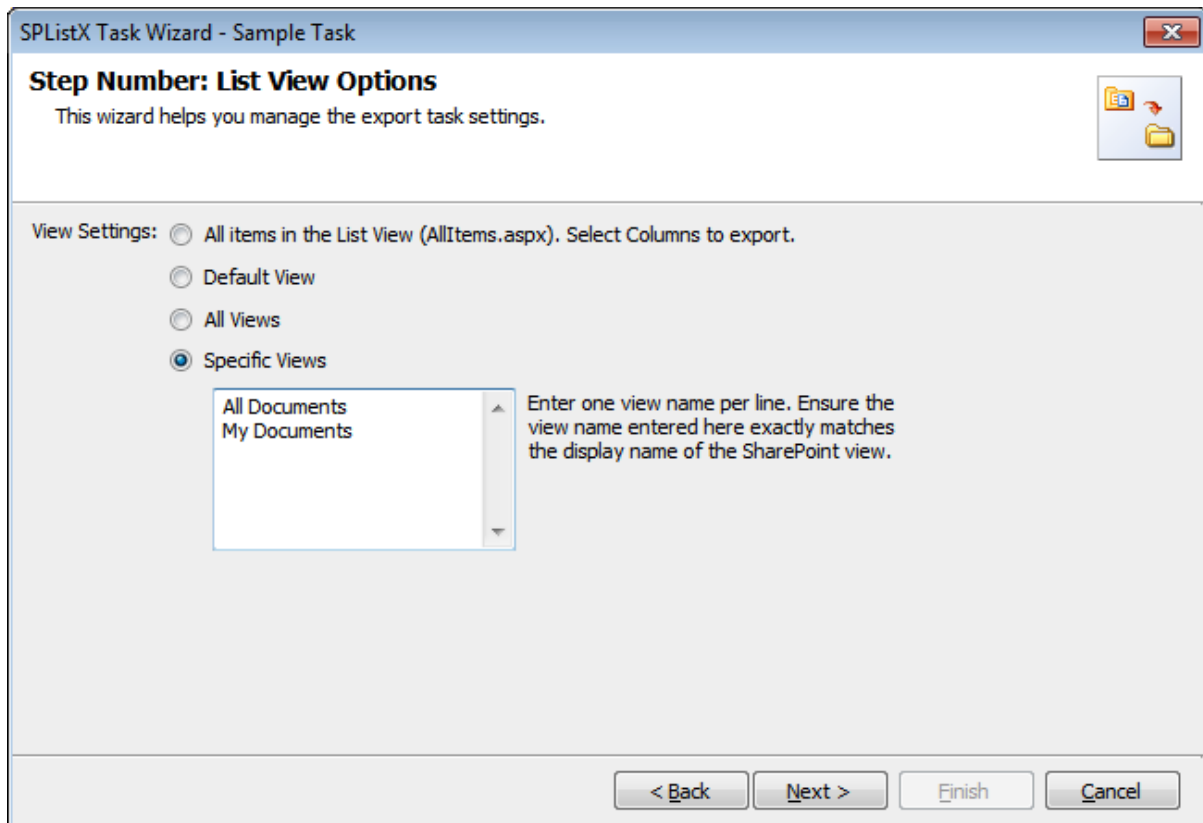
Title  
ContentType

Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.

< Back   Next >   Finish   Cancel

- b) Default View** - Exports all items (including folders) available in the Default view of the given SharePoint list. The SharePoint columns defined in the default view will be exported to the metadata file.
- c) All Views** - Exports all Views in the SharePoint list. The SharePoint columns defined in the respective list views will be exported to the metadata file.
- d) Specific Views** - Exports views that are specified in the textbox. The SharePoint columns defined in the respective list views will be exported to the metadata file.

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file



The screenshot shows a Windows-style dialog box titled "SPListX Task Wizard - Sample Task". The main heading is "Step Number: List View Options". Below the heading is a descriptive sentence: "This wizard helps you manage the export task settings." In the top right corner, there is a small icon of a folder with a red arrow pointing into it. The main content area is titled "View Settings:" and contains four radio button options: "All items in the List View (AllItems.aspx). Select Columns to export.", "Default View", "All Views", and "Specific Views". The "Specific Views" option is selected. Below this selection is a text box containing the text "All Documents" and "My Documents". To the right of the text box is a note: "Enter one view name per line. Ensure the view name entered here exactly matches the display name of the SharePoint view." At the bottom of the dialog, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

SPListX Task Wizard - Sample Task

**Step Number: List View Options**

This wizard helps you manage the export task settings.

View Settings:

- ☐ All items in the List View (AllItems.aspx). Select Columns to export.
- ☐ Default View
- ☐ All Views
- ☒ Specific Views

All Documents  
My Documents

Enter one view name per line. Ensure the view name entered here exactly matches the display name of the SharePoint view.

< Back   Next >   Finish   Cancel

Click **Next** to proceed.

### 4.6 Version Options

To selectively export list item versions to the destination file system location:

- 1) The **Version Options** step appears as shown below:

**SPListX Task Wizard - Sample Task**

**Step Number: Version Options**  
Specify the list item versions to export. By default, latest version of the list item will be exported.

**Export Versions:**

- ☒ All versions
- ☐ Export version range: Start:  End:
- ☐ Export version date range: Start: 20-Feb-12 ☐ End: 20-Feb-12
- ☐ Export major versions only
- ☐ Latest version only

**File Version Handling:**

- ☒ Export each file version to a version folder named as v<VersionNumber>
- ☐ Store latest version in root folder
- ☐ Store latest version in the respective version folder
- ☐ Export each file version as separate files named as <FileName>\_v<VersionNumber>

< Back Next > Finish Cancel

#### 2) Export Versions:

By default, **All versions** option is selected. Item version settings will be used for each of the list items exported from the list. Select any one of the following version settings:

- a) All versions** - Export all list item versions available in the source list.
- b) Export version range** - Export only list item versions specified in the range from the source list e.g., versions 2 to 5.
- c) Export version date range** - Export only list item versions by date specified in the range from the source list e.g., versions date 11/19/2010 - 15/19/2010. The source list date used for exporting is Modified date of a list item.
- d) Export major versions only** - Export the major list item version from the source.
- e) Latest version only** - Export the latest list item version from the source.

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

### 3) File Version Handling:

**SPListX Task Wizard - Sample Task**

**Step Number: Version Options**  
Specify the list item versions to export. By default, latest version of the list item will be exported.

**Export Versions:**

- ☒ All versions
- ☐ Export version range: Start:  End:
- ☐ Export version date range: Start:  ☐ End:
- ☐ Export major versions only
- ☐ Latest version only

**File Version Handling:**

- ☒ Export each file version to a version folder named as
- ☐ Store latest version in root folder
- ☐ Store latest version in the respective version folder
- ☐ Export each file version as separate files named as

< Back   Next >   Finish   Cancel

Select *any one* of the following *export options*:

- a) **Export each version to a version folder named as** - This option will create a version folder for each file version based on the version folder name specified in the folder name mask textbox. You have the option to export the latest file version to the root folder or export it to the respective version folder.
- (i) **Store latest version in root folder** – Export the latest file version to the root folder specified by the user. To select Version folder name, click the button placed next to the export version to as version folder name textbox.

**Version folder name mask** *dialog* appears as shown below:

**Version folder name mask**

Specify a valid folder name to export latest file version.

Macro	Sample Value
ListName	Shared Documents
Timestamp	20120220-114541
VersionNumber	1

Insert

Result

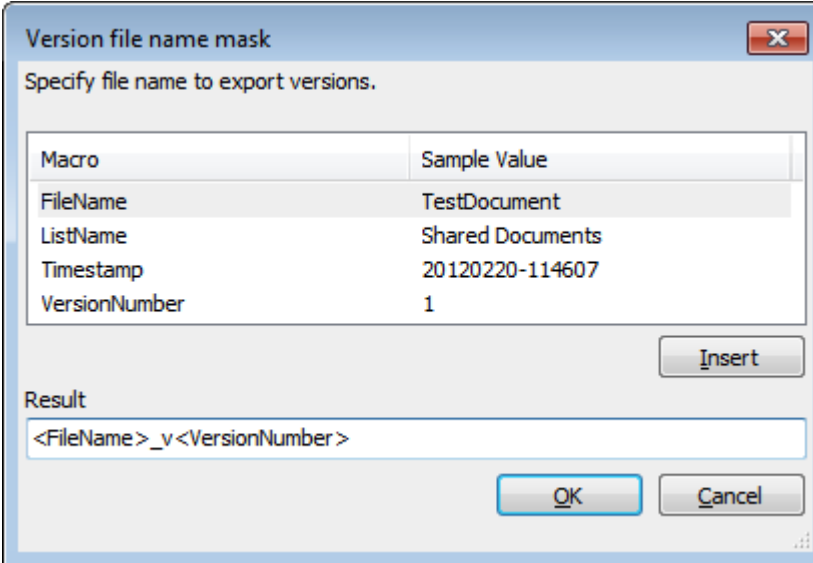
OK   Cancel

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

You can use the available macros to construct the new folder name in the **Result** textbox.

**(ii)Store latest version in the respective version folder** - This option will create a version folder name based on the current file version and export the file into the version folder.

**b) Export each file version as separate files named as** - Each file version will be exported using the file version name constructed in the file version name mask text box. To select **Version file name**, click the button placed next to the export version to a separate file name textbox. Version file name mask dialog appears as shown below



The dialog box titled "Version file name mask" contains a table with two columns: "Macro" and "Sample Value". The table lists four macros: FileName (TestDocument), ListName (Shared Documents), Timestamp (20120220-114607), and VersionNumber (1). Below the table is an "Insert" button. At the bottom, there is a "Result" label and a text box containing the macro string "<FileName>\_v<VersionNumber>". "OK" and "Cancel" buttons are at the bottom right.

Macro	Sample Value
FileName	TestDocument
ListName	Shared Documents
Timestamp	20120220-114607
VersionNumber	1

Result

<FileName>\_v<VersionNumber>

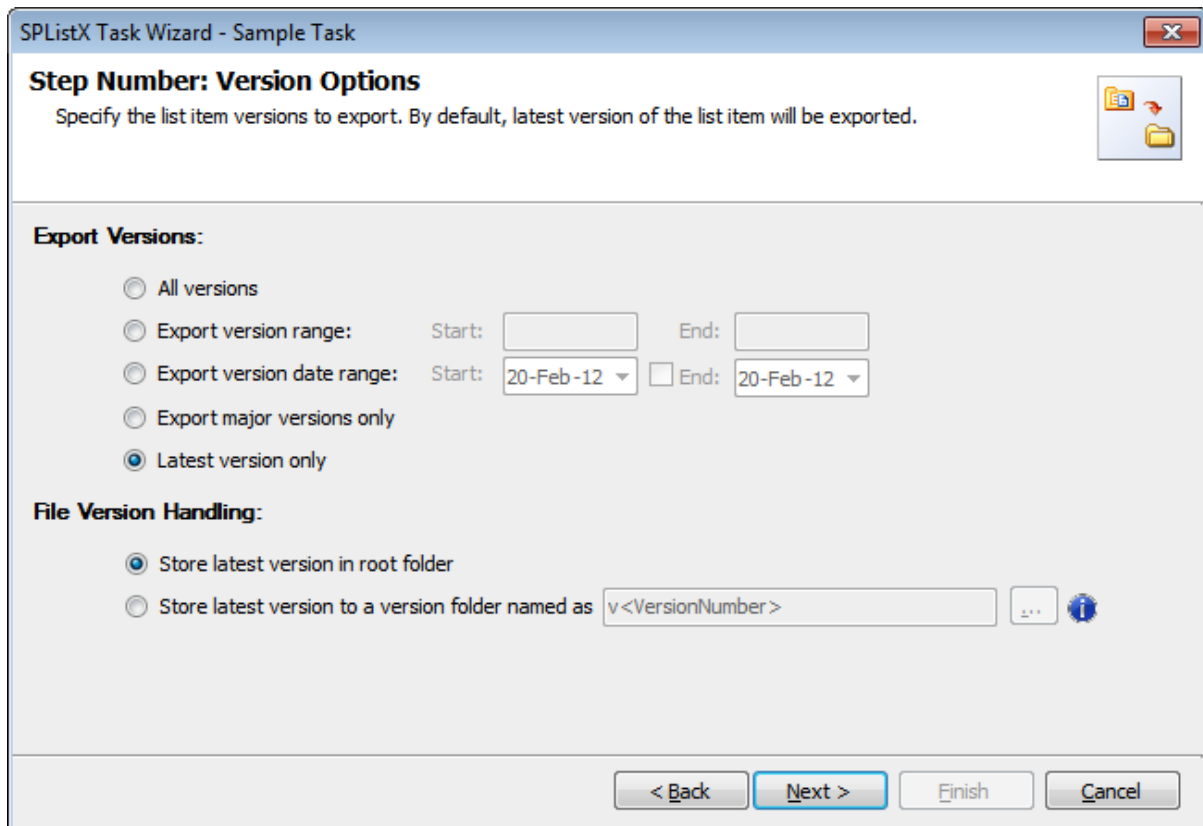
You can use the available macros to construct the new file name in the **Result** textbox.

**4)** Click **Next** to proceed.



## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

For **Latest Version Only** option in the **Export Versions**, you have the option to export the **latest file version** to the root folder or export it to the respective version folder. The **File Version Handling** settings appear as shown below:



SPListX Task Wizard - Sample Task


**Step Number: Version Options**

Specify the list item versions to export. By default, latest version of the list item will be exported.

**Export Versions:**

- ☐ All versions
- ☐ Export version range: Start:  End:
- ☐ Export version date range: Start:  ☐ End:
- ☐ Export major versions only
- ☒ Latest version only

**File Version Handling:**

- ☒ Store latest version in root folder
- ☐ Store latest version to a version folder named as  

< Back Next > Finish Cancel

- a) **Store latest version in root folder** - Export the latest version in the root folder itself
- b) **Store latest version in the respective version folder** - Creates a latest version folder and export the latest file version in the latest version folder.

### 4.7 Permission Options

**SPListX** can export SharePoint site / list / list item permission information to the metadata file. This feature works only for SharePoint 2010 environment.

1) The **Permission options** specification wizard step appears as shown below:

**SPListX Task Wizard - Sample Task**

**Step Number: Permission Options (Works only for SharePoint 2010)**  
Export site / list / item permission from SharePoint file to the metadata file.

**Export Permissions:**

☒ Do not export permissions

☐ Export permissions

Export permissions for: ☐ Site ☐ List ☒ List item

Permission format:

☒ User - Role format (e.g., johndoe: Full Control)

☐ Role - User format (e.g., Full Control: johndoe)

Inheritance status:

☐ Export inheritance status as separate column (shows if the permission is Unique or Inherited)

Membership information:

☐ Export membership information and role definition to a separate XML file

< Back Next > Finish Cancel

#### Export Permissions:

- a) **Do not export permissions** - This option will not export permissions to the metadata file.
- b) **Export permissions** - This option will export permissions based on the user specified options.

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

The export permissions options appear as shown below:

SPListX Task Wizard - Sample Task

**Step Number: Permission Options (Works only for SharePoint 2010)**

Export site / list / item permission from SharePoint file to the metadata file.

**Export Permissions:**

☐ Do not export permissions

☒ Export permissions

Export permissions for: ☒ Site ☒ List ☒ List item

Permission format:

☒ User - Role format (e.g., johndoe: Full Control)

☐ Role - User format (e.g., Full Control: johndoe)

Inheritance status:

☒ Export inheritance status as separate column (shows if the permission is Unique or Inherited)

Membership information:

☒ Export membership information and role definition to a separate XML file

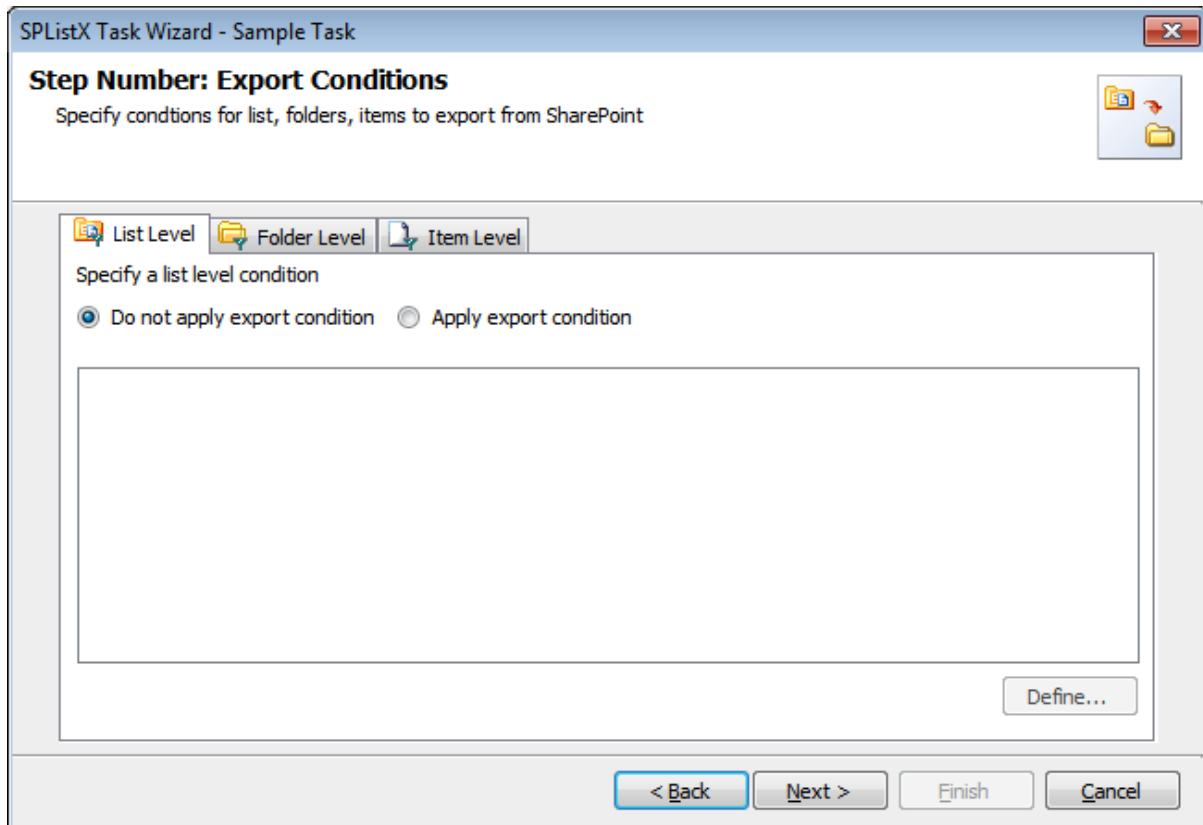
< Back Next > Finish Cancel

- 2) You can export permissions for **Site / List / List item** to the metadata file depending on the user selection. Check appropriate checkboxes in **Export permission for:** options.
- 3) Specify the **Permission format** to use when exporting the permission information for the Site / List / List item to the metadata file using the options given below:
  - a) **User - Role format** – Exports permission details as User – Role e.g., johndoe: Full Control, Limited Access; johnsmith: Read, View Only etc.
  - b) **Role - User format** – Exports permission details as Role – User e.g., Full Control: johndoe, johnsmith; Contributor: janedoe etc.
- 4) **Inheritance status** - Export the inheritance status of the Site / List / List item as a separate column / field in the metadata file. This column / field indicate if the permission is 'Inherited or Unique' role assignment at the Site / List / List item level in SharePoint.
- 5) **Membership information** - This option exports membership and role definition information to separate XML files. These XML files are stored in the same location as the metadata files in the name `_membershipinformation` and `_roledefinition`. The user account that connects to SharePoint must have (System Account) permission to retrieve respective membership information. Similarly, the user account specified in Active Directory Profile Manager for each domain must have (Domain Admin) permission to retrieve respective membership information.
- 6) Click **Next** to Proceed.

### 4.8 Export Conditions

**SPListX** can export folders, files and list items including attachments from SharePoint list based on certain export conditions. The conditions can be created by using SharePoint columns in the source list.

1) The **Export Conditions** step appears as shown below:



2) You can specify export conditions at three levels:

- List Level
- Folder Level
- List Item Level

#### 3) List Level Conditions

Select any one of the following options given below:

- **Do not apply any conditions** - No conditions will be used to filter lists.
- **Apply the following conditions** - The conditions specified will be used to filter lists taken for export from source SharePoint List.

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

- 4) Click **Define** to specify the conditions

The **List Export Conditions Dialog** appears as shown below:

The screenshot shows a dialog box titled "List Export Condition" with a close button (X) in the top right corner. Below the title bar, there is a text box containing the instruction: "Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export list only when ['List Type' = 'Document Library'].". Below this, there are three dropdown menus labeled "Field Name", "Operator", and "Value". Below these dropdowns are two buttons: "Add to Filter" and "'OR' to Filter". Below these buttons is a section labeled "Conditions:" with a toolbar containing icons for parentheses '(', ')', logical operators '&AND' and '&OR', and a delete icon (X). Below the toolbar is a large empty text area for defining conditions. At the bottom, there is a label "Export list items if the above condition is" followed by two radio buttons: "satisfied" (which is selected) and "not satisfied". At the very bottom are "OK" and "Cancel" buttons.

- 5) You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =, <> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

**List Export Condition**

Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export list only when [List Type] = [Document Library].

Field Name: Base Type

Operator: =

Value: Document Library

'AND' to Filter    'OR' to Filter

Conditions:

[Base Type] = 'Document Library'

Export list items if the above condition is ☒ satisfied ☐ not satisfied

OK    Cancel

6) SPListX will export the lists that satisfy the export condition or export the lists that do not satisfy the export condition depending on the option selected by the user:

- **Export list items if the above conditions are satisfied** - Lists that satisfy the condition will be marked for export.
- **Export list items if the above conditions are not satisfied** - Lists that do not satisfy the condition will be marked for export.

### 7) Folder Level Conditions

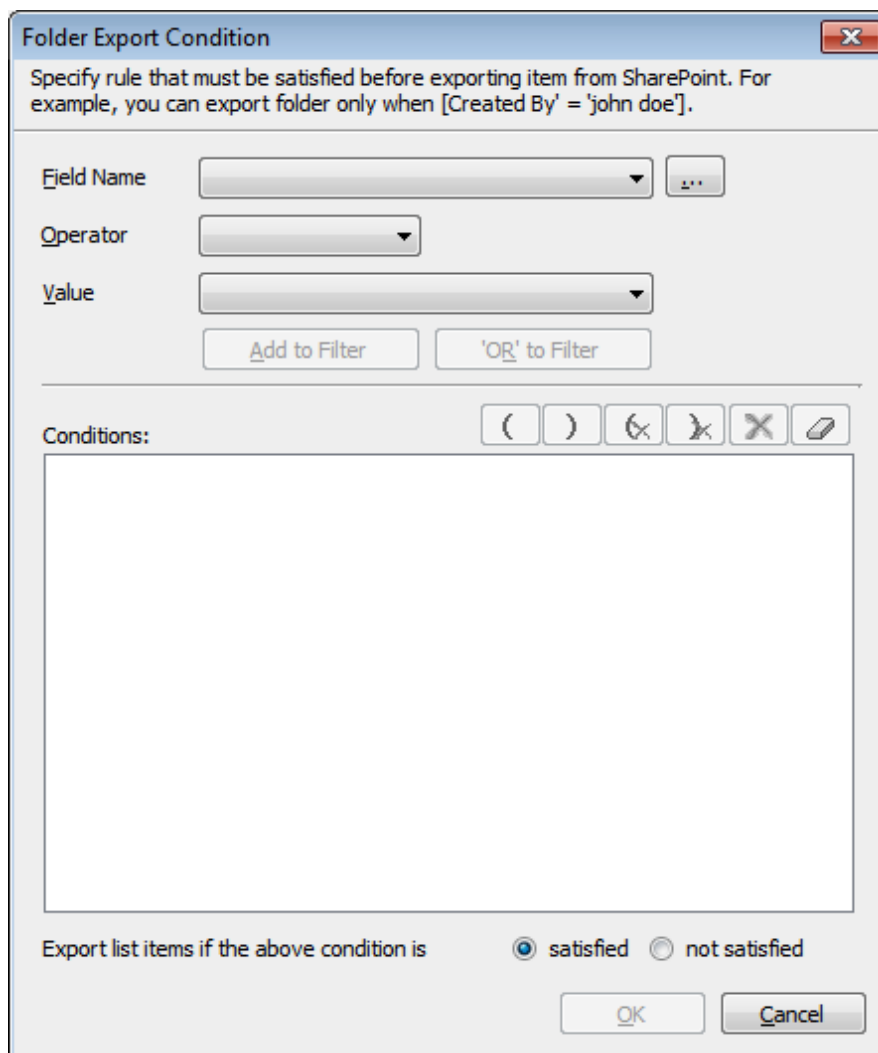
Select any one of the following options given below:

- **Do not apply any conditions** - No conditions will be used to filter folders.
- **Apply the following conditions** - The conditions specified will be used to filter folders taken for export from source SharePoint List.

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

- 8) Click **Define** to specify the conditions

The **Folder Export Conditions Dialog** appears as shown below:



The **Folder Export Condition** dialog box is used to specify rules for exporting items from SharePoint. It includes fields for Field Name, Operator, and Value, along with buttons to add or remove conditions. The Conditions section is empty, and the dialog is set to export items if the condition is satisfied.

Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export folder only when [Created By] = 'john doe'.

Field Name:  ...

Operator:

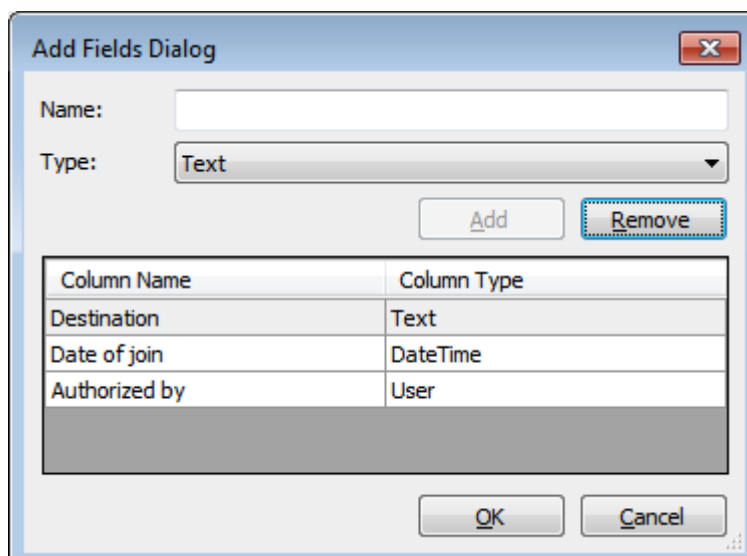
Value:

Conditions:

Export list items if the above condition is ☒ satisfied ☐ not satisfied

- 9) Click **(...)** button to add the SharePoint columns in **Field Name** dropdown.

The **Add Fields Dialog** appears as shown below:



The **Add Fields Dialog** is used to add SharePoint columns to the Field Name dropdown. It includes fields for Name and Type, and buttons to add or remove fields. The table below shows the current list of fields.

Name:

Type:

Column Name	Column Type
Destination	Text
Date of join	DateTime
Authorized by	User

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

Specify the column name in **Name** textbox and select the data type of the column in SharePoint from **Type** drop-down.

Click **Add** button to add the columns to the *fieldname* dropdown list.

Click **Remove** button to remove the columns from the *fieldname* dropdown list.

- 10)** You can specify the export conditions by selecting the **field name** and by specifying a **value** with necessary **operator**.

You can use mathematical operators such =, <> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.

Folder Export Condition

Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export folder only when [Created By] = 'john doe'.

Field Name: Created Date

Operator: <=

Value: 01-Jan-12

'&Agrave;' to Filter   '&Ograve;' to Filter

Conditions:

[Created Date] <= #01-Jan-12#

Export list items if the above condition is ☒ satisfied ☐ not satisfied

OK Cancel



## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

**11)** SPListX will export the folders that **satisfy** the export condition or export the folders that **do not satisfy** the export condition depending on the option selected by the user:

- **Export list items if the above conditions are satisfied** - Folders that satisfy the condition will be marked for export.
- **Export list items if the above conditions are not satisfied** - Folders that do not satisfy the condition will be marked for export.

### **12) List Item Level Conditions**

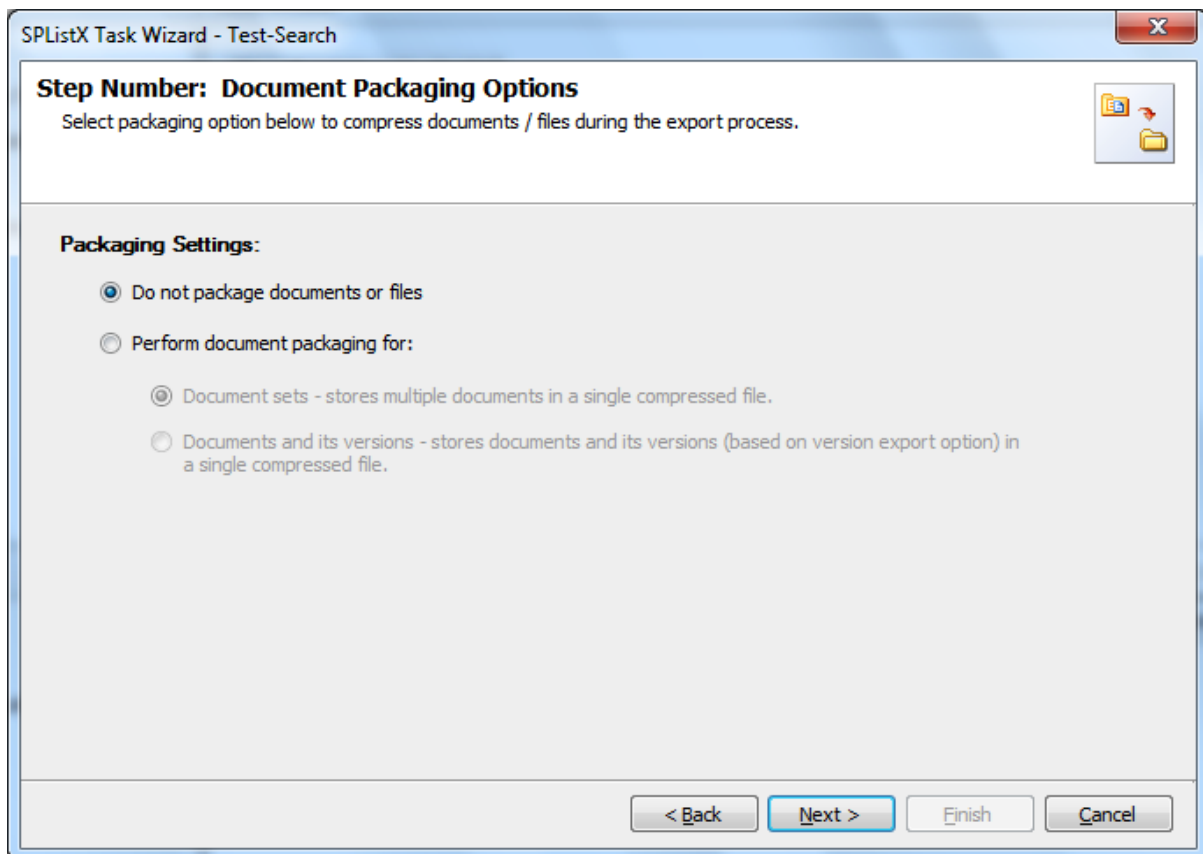
*Same as Folder Level Conditions*

**13)** Click **Next** to proceed.

### 4.9 Document Packaging Options

Document Packaging helps in storing related documents / contents together in a single file in compressed format. SPListX has the provision to export document sets and document / file versions as packaged contents grouped together. Follow the steps outlined below to store multiple document versions and document sets grouped together in the file system / file share.

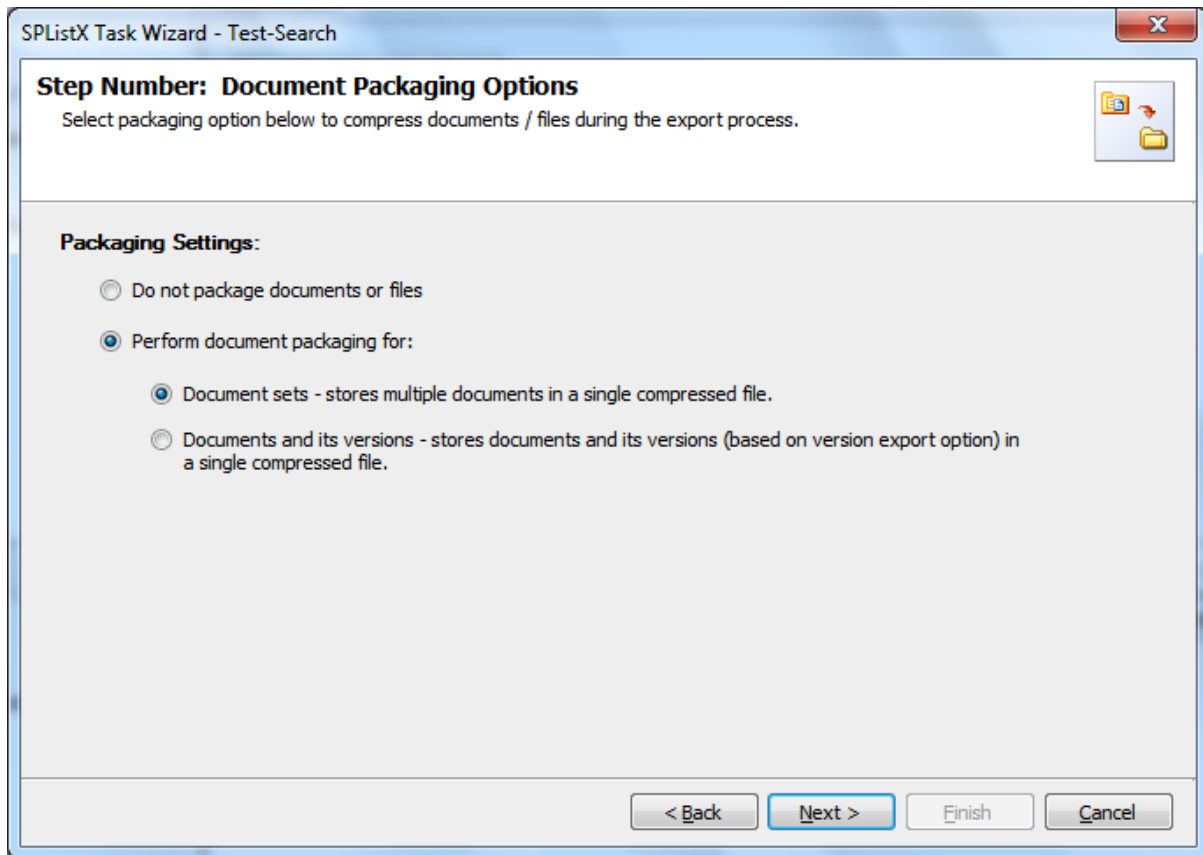
**1) The Document Packaging Options step appears as shown below:**



**2) Select Packaging Settings from the options outlined below:**

- a) Do not package documents or files:** SPListX will not package the exported documents or files.
- b) Perform document packaging for:** Document package will be created for each exported document set or file version based on the option selected below. If the file already exists in the package, **File Settings** options will be applied.

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file



- i. **Document sets** - This option will package all files stored in the document sets into a single compressed file. The package is created in the same name as the document set.
  - ii. **Documents and its versions** - This option will package the documents and its associated versions into a single compressed file. The package is created in the same name as original document or file. The document's versions are exported into the created package based on the settings specified in **Versions Settings wizard** step.
- 3) Click Next to Proceed to the Next Step.

### 4.10 Destination Folder Options

**SPListX** will create destination folders based on the following options given below:

- 1) The **Destination Folder options** specification wizard step appears as shown below:

**SPListX Task Wizard - Sample Task**

**Step Number: Destination Folder Options**  
Specify folders settings to use when creating folders in file system.

Do you want to create current timestamp folder under destination location? ☐ Yes ☒ No ⓘ

Do you want to create the top-level folder(s) included for export? ☒ Yes ☐ No ⓘ

Do you want to create destination folder path if it does not exist? ☒ Yes ☐ No ⓘ

Do you want to create a folder for the list or folder underneath, when its contents are empty? ☒ Yes ☐ No ⓘ

Do you want to create separate folder for storing attachments? ☒ Yes ☐ No ⓘ

Attachment Folder Tag:  ⓘ

< Back Next > Finish Cancel

- 2) Select from the following options:

- a) **Do you want to create current timestamp folder under destination location?** - This option creates timestamp folder under the specified destination location. This option may be useful when scheduling the export process or when repeated exporting contents to the same destination location. Select the appropriate option to create the timestamp folder by selecting the option (Yes/No).
- b) **Do you want to create top-level folder(s) included for export?** - The top-level folder is the folder added or specified for export by the user. SPListX will commence the export process from this top-level folder. Select the appropriate option to create the top-level folder by selecting the option (Yes/No).

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

**c) Do you want to create destination folder path if it does not exist? -**

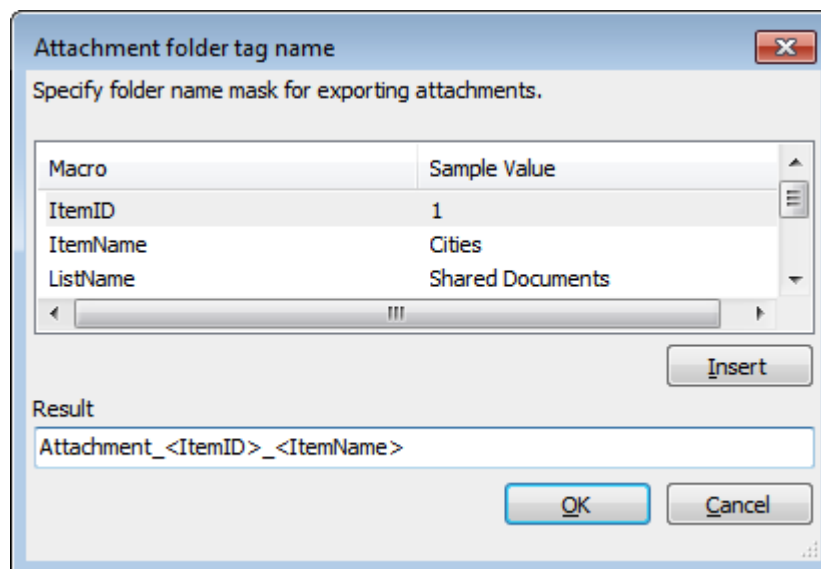
This option creates the full folder path in the destination location, if the specified path is not available in the specified location by selecting the option yes.

**d) Do you want to create a folder for the list or folder underneath, when its contents are empty? -** This option creates the folder in the destination location, if the source list or folder contents are empty. Select the appropriate option to create the folder by selecting the option (Yes/No).

**e) Do you want to create separate folder for storing attachments? -** This option creates separate folder for storing attachments under the specified destination location by selecting the option (yes/No).

- 3)** You can create separate folder for storing file attachments associated with list items. The folder / file naming option will be useful when list item attachments have the same name. You have the option to select an attachment folder or file naming convention to use when exporting list item attachments.

The attachment folder will be named based on the folder naming convention specified by the user. To select attachment folder naming mask, click the button placed next to the **Attachment folder tag name** text box. This dialog appears as shown below:




Construct attachment folder name with the available mask provided in the dialog. Click **OK** to close the dialog. The constructed folder name mask will be placed in *attachment folder naming tag textbox* as shown below. Attachments will be exported to the resultant folder name mask value.


## CHAPTER 4– Export SharePoint List contents using a batch descriptor file


SPListX Task Wizard - Sample Task


**Step Number: Destination Folder Options**


Specify folders settings to use when creating folders in file system.



Do you want to create current timestamp folder under destination location? ☐ Yes ☒ No 

Do you want to create the top-level folder(s) included for export? ☒ Yes ☐ No 

Do you want to create destination folder path if it does not exist? ☒ Yes ☐ No 

Do you want to create a folder for the list or folder underneath, when its contents are empty? ☒ Yes ☐ No 

Do you want to create separate folder for storing attachments? ☒ Yes ☐ No 

Attachment Folder Tag:   

< Back Next > Finish Cancel

4) Click **Next** to Proceed.

### 4.11 File Settings

To construct Alternate File Mask and to propagate created Date and Modified Date from SharePoint Library to Windows File System, use below options:

#### 1) Alternate File Name Mask

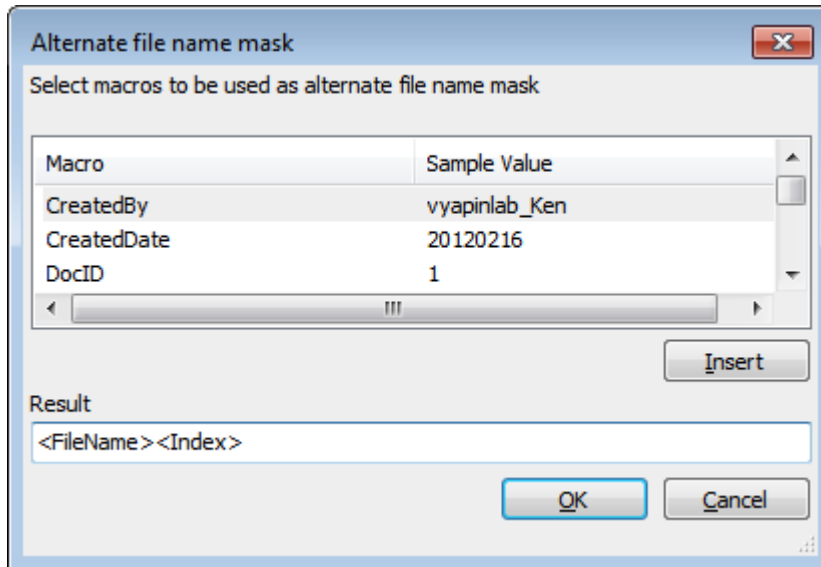
If the file with the same name already exists in the destination location, follow the steps outlined below:

The screenshot shows the 'SPListX Task Wizard - Batch' window at the 'Step Number: File Settings' stage. The window has a title bar with a close button (X). The main content area includes a description: 'Use the option below to manage file duplicates in the Windows File System. You can also propagate Created Date and Last Modified Date fields from SharePoint Library to the Windows File System.' Below this, a section titled 'If the file with the same name already exists in the destination location:' contains three radio button options: 'Do not overwrite the existing file', 'Overwrite the existing file', and 'Rename the new file that is currently exported from SharePoint'. The third option is selected. Below the radio buttons is a text field for 'Alternate File Name Mask' containing the text '<FileName>(<Index>'. To the right of the text field are two small icons: a folder icon and an information icon. Below the text field, there is a paragraph of text: 'You can propagate original created date and last modified date for folders and files from SharePoint library to the NTFS file system. In a FAT file system, the last modified date alone will be retained from SharePoint library. When document packaging option is selected, the created date alone will be retained from the SharePoint library.' Below this text are two checked checkboxes: 'Retain created date' and 'Retain modified date'. At the bottom of the window are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

- a) **Do not overwrite the existing file** - Skips the file without overwriting the existing file with the same name.
- b) **Overwrite the existing file** - Deletes the file from the destination location and exports the current source file.
- c) **Rename the new file that is currently exported from SharePoint** - Rename the file based on the file name mask specified in the Alternate File Name Mask text box.

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

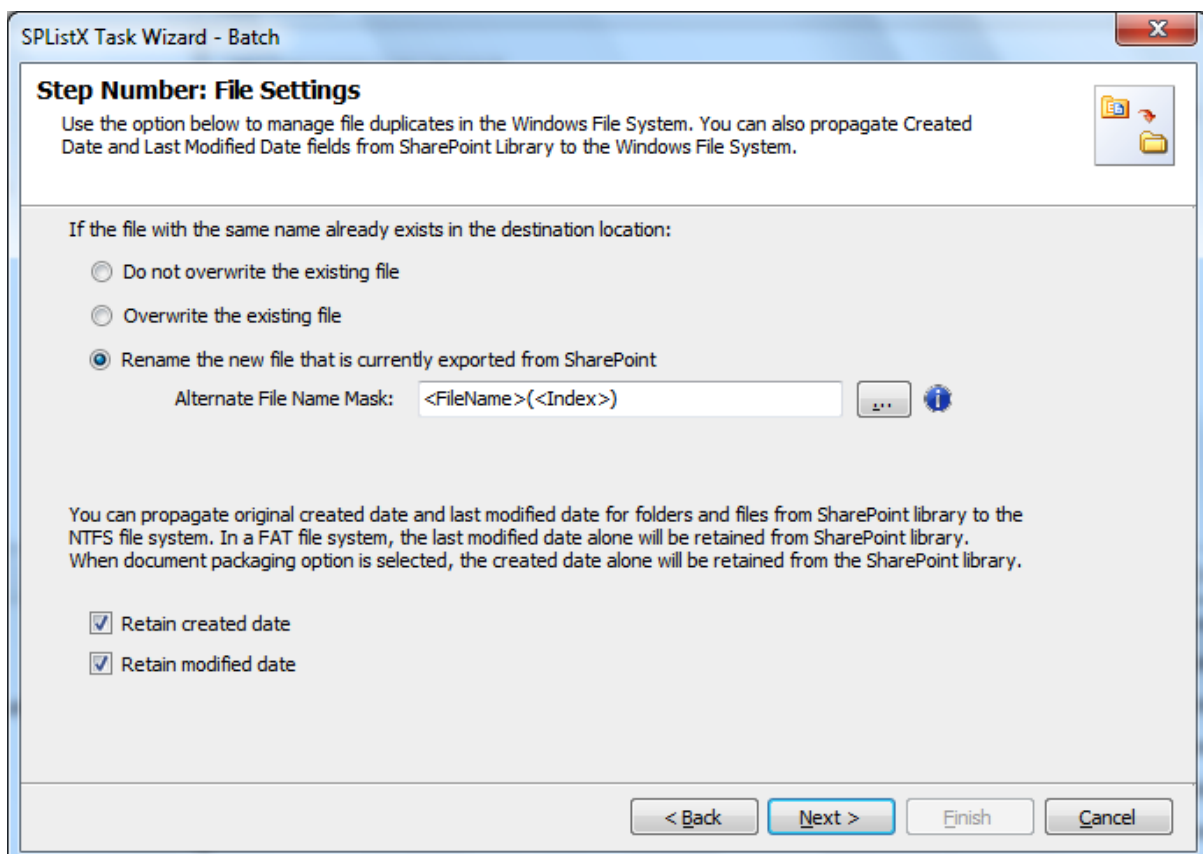
To select alternate file naming mask, click the **alternate file name mask** button placed next to the **alternate file name mask** textbox. **Alternate file name mask** dialog appears as shown below:



Construct alternate file naming mask with the available macros provided in the dialog. Click **OK** to close the dialog. The new files will be exported in the name format / syntax entered in the file naming mask.

### 2) File System Date Settings:

To propagate the system date fields - Created Date and Last Modified Date to respective folders and files in the file system, follow the steps outlined below:





## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

Select File System Date Settings:

The date options given below will assign the respective data field values in the file system as in the original SharePoint list.

- a) Retain created date** - Carry forward / propagate Created Date field from the source folders, files and list item attachments to the Windows file system.
- b) Retain modified date** - Carry forward / propagate Last Modified Date field from the source folders, files and list item attachments to the Windows file system.

**NOTE:** You can propagate original Created Date and Last Modified Date for folders and files to the NTFS file system. In a FAT file system, the Last Modified Date alone will be retained as in source.

- 3)** Click **Next** to Proceed.

### 4.12 Metadata File Settings

**SPListX** will create metadata files based on the following options given below:

1) **The Metadata File Settings** step appears as shown below:

SPListX Task Wizard - Sample Task

**Step Number: Metadata File Settings**  
Specify destination path to store metadata file and export file format (CSV/XLSX/XML)

Metadata file name & location:

☒ Store metadata file(s) in this location C:\Users\Public\Documents\SPListX ... XLSX ▼

☐ Store metadata file(s) in [dropdown] format in the respective list folder location

If file already exists?

☒ Append metadata file ☐ Overwrite metadata file ☐ Tag timestamp with filename

New header names: (Optional)

Column Name	Header Name
Source URL	Source URL
Version Number	Version Number

Edit...

< Back Next > Finish Cancel

2) SPListX creates the metadata file using the List name and List GUID in the format - List Name (List GUID) to maintain a unique metadata file name.

3) Specify the **Metadata filename & location** using the options below:

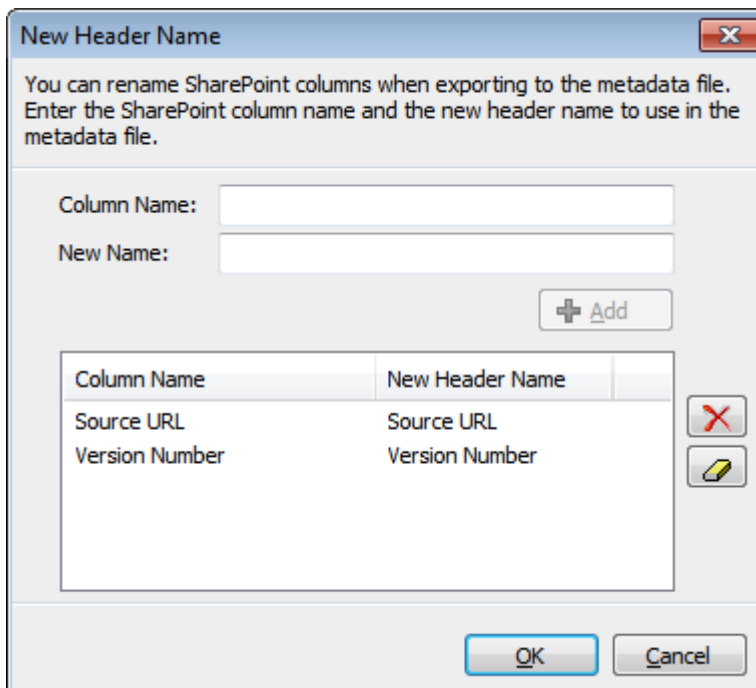
a) **Store metadata file(s) in this location:** Specify a folder path where the selected list items metadata are to be exported. You can also *Click **browse** ('...')* button to launch folder browser dialog.

b) **Store metadata file(s) in the respective list folder location:** - This option will export the metadata file in the selected file format into the respective list folder locations where the physical documents/ files are exported.

**NOTE:** Ensure that the user context used to run the SPListX export process has sufficient permissions to create, edit and delete folders and files in the specified export path.

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

- 4) If the metadata file already exists in the destination location, choose from any one of the following options:
- a) **Append:** This option will append the new metadata in the existing metadata file.
  - b) **Overwrite:** This option will overwrite the existing metadata file.
  - c) **Tag timestamp with file name:** This option will create a new metadata file tagged with a timestamp for each export.
- 5) You can specify new column names to use when generating the metadata file in the file system location. To use this feature, specify the new header names by clicking the Edit button. A New Header Dialog appears as shown below:



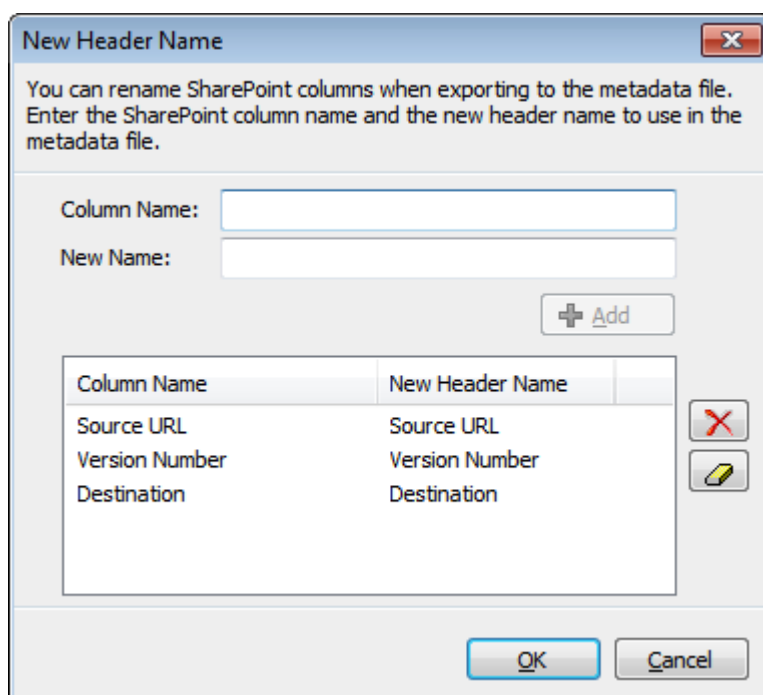
The dialog box is titled "New Header Name" and contains the following elements:

- A close button (X) in the top right corner.
- Instructional text: "You can rename SharePoint columns when exporting to the metadata file. Enter the SharePoint column name and the new header name to use in the metadata file."
- Two text input fields: "Column Name:" and "New Name:".
- An "+ Add" button to the right of the input fields.
- A table with two columns: "Column Name" and "New Header Name".
- Buttons for deleting (X) and editing (pencil) the table entries.
- "OK" and "Cancel" buttons at the bottom.

Column Name	New Header Name
Source URL	Source URL
Version Number	Version Number

- 6) Specify SharePoint column name in the **Column Name** textbox and a new field name to use in the **New Name** textbox. Click **OK**. For example, a SharePoint column named 'Department' in the source SharePoint list can be renamed as 'Location' when creating the metadata files during the export operation.

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file



7) Click **Next** to Proceed.

### XML File Format

SPListX uses Document Type Definition (DTD) syntax to define the document structure of the XML metadata file. This declaration has been introduced primarily to support large XML metadata files, minimize memory footprint when working with large XML files and improve metadata file throughput.

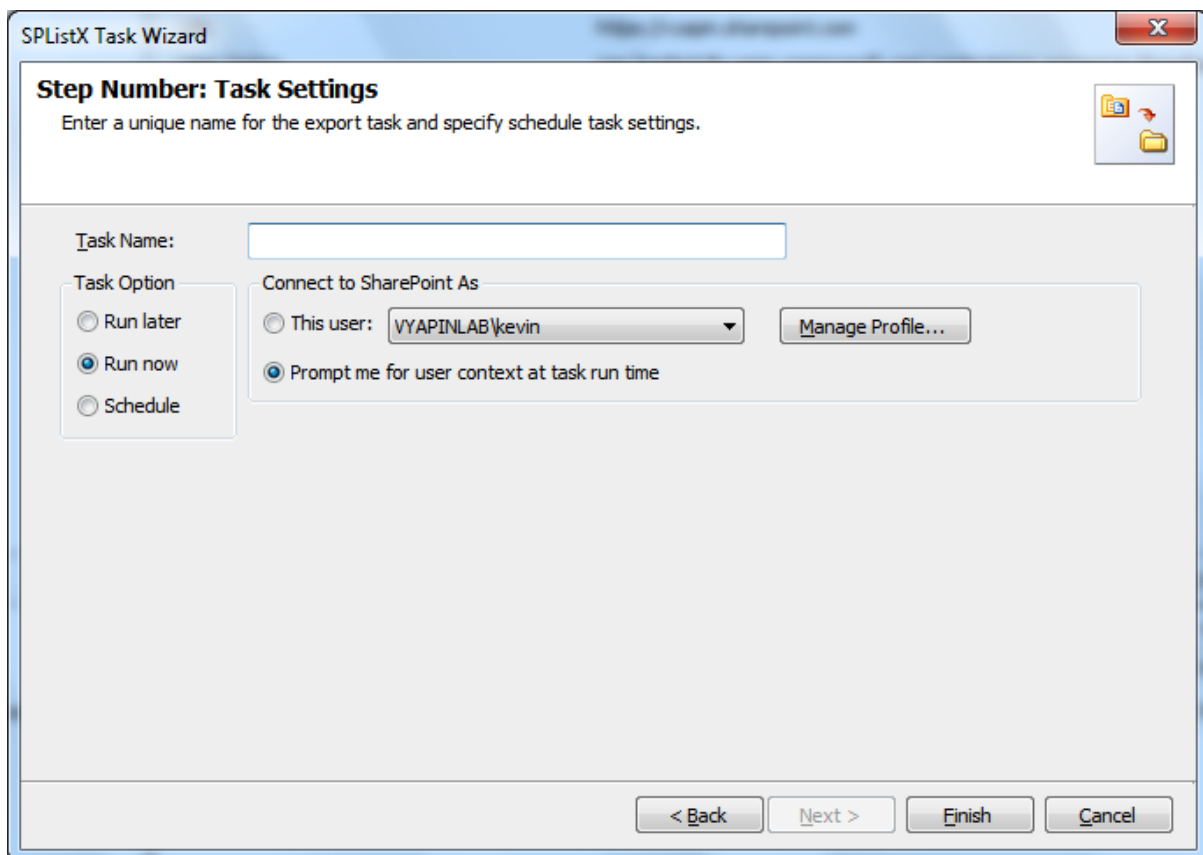
XML metadata files are split into multiple text files and stored in a folder location that is constructed using the list name and its corresponding GUID. An XML file is created using the metadata filename specified by the user in the stated metadata file location. When you click the XML file, the text files in the folder are re-grouped using the DTD file to form a single XML file.

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

### 4.13 Task Settings

To specify the task name and schedule settings, follow the instructions given below. Please note that the task options will change depending on whether you are using Windows / Forms authentication or Web Single Sign-on credentials to connect to SharePoint.

1) **The Task Settings** step appears as shown below:



2) Enter a unique task name in **Task Name** textbox.

3) Select a **Task Option** from one of the following options:

- a) **Run later** - to run the task later as and when desired
- b) **Run now** - to run the task immediately after clicking **Finish** button
- c) **Schedule** -to create a Windows scheduled task. SPListX will create a schedule task in the Windows Scheduled Tasks applet with the stated settings. SPListX will perform the export based on the *Run As* user account specified in this export wizard step. The *Run As* account should be a valid Windows domain account.

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

**SPListX Task Wizard**

**Step Number: Task Settings**  
Enter a unique name for the export task and specify schedule task settings.

**Task Name:** Sample Task

**Task Option**

- ☐ Run later
- ☐ Run now
- ☒ Schedule

**Connect to SharePoint As**

- ☐ This user: VYAPINLAB\kevin [Manage Profile...](#)
- ☒ Use 'Run As' user context given below

**Schedule Settings**

**Run As:** VYAPINLAB\Administrator [Set Password...](#)

**Schedule:** Daily **Start time:** 18:32 [Advanced...](#)

**Schedule Task Daily**

Every 1 day(s)

At 18:32 every day, starting 08-05-2012

< Back   Next >   Finish   Cancel

In scheduled export process, SPListX allows the user to enter different user credentials to connect to SharePoint and to create a scheduled export task (unattended mode).

By default, SPListX will use the user account specified in the scheduled 'Run As' user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint when running the scheduled task, you can do so by storing the SharePoint user context for future use.

SPListX will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords / Credential Manager applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you will not be allowed to change the scheduled 'Run As' user context for the export task.

Click **Manage Profile** button to create new user profile.

- 5) As for **Web Single Sign-on** credential based export task, the task settings will be shown as below:

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

The screenshot shows the 'SPListX Task Wizard' window, specifically the 'Step Number: Task Settings' dialog. The window has a title bar with 'SPListX Task Wizard' and a close button. Below the title bar, the text 'Step Number: Task Settings' is displayed, followed by the instruction 'Enter a unique name for the export task and specify schedule task settings.' In the top right corner, there is a small icon of a folder with a red arrow. The main area of the dialog contains a 'Task Name:' label followed by a text input field. Below this, there is a 'Task Option' section with three radio buttons: 'Run later', 'Run now' (which is selected), and 'Schedule'. To the right of the 'Task Option' section, there is a 'Connect to SharePoint As' section. It contains two radio buttons: 'This user:' followed by a dropdown menu and a 'Manage Profile...' button, and 'Prompt me for user context at task run time' (which is selected). At the bottom of the dialog, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

The Web Single Sign-on framework expects the user name and password to be given by user interactively in a browser based login dialog. Hence, the user profile list is not accessible for this type of connection.

- 6) As far as scheduled run is concerned, SPListX enables you to setup the export task using persistent connection and shared credential as shown below:

## CHAPTER 4– Export SharePoint List contents using a batch descriptor file

**SPListX Task Wizard**

**Step Number: Task Settings**  
Enter a unique name for the export task and specify schedule task settings.

**Task Name:** Sample Task (Office365)

**Task Option**

- ☐ Run later
- ☐ Run now
- ☒ Schedule

**Connect to SharePoint As**

- ☐ This user:
- ☒ Use persistent session of the target site. [Check session status in Web SSO Dashboard](#)

**Schedule Settings**

**Run As:** VYAPINLAB\kevin

**Schedule:** Daily  **Start time:** 18:32

**Schedule Task Daily**

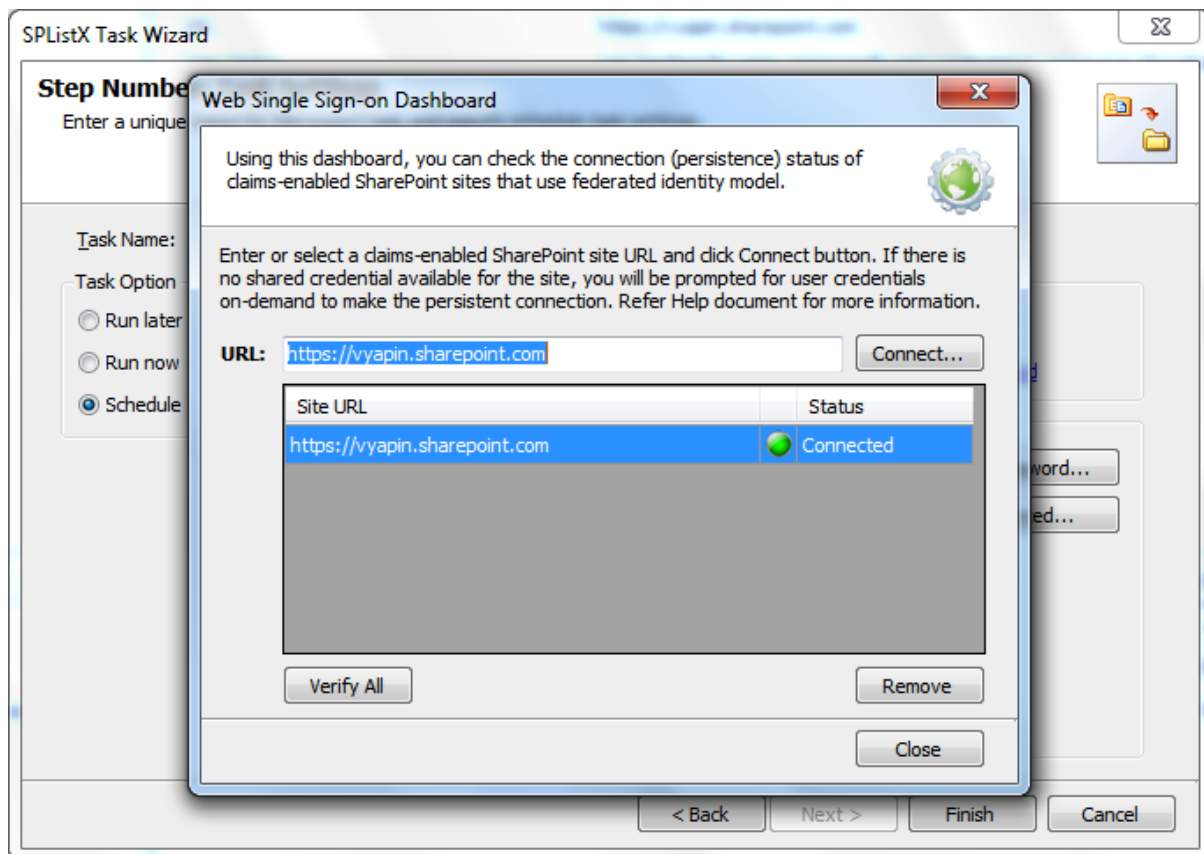
Every 1   day(s)

At 18:32 every day, starting 08-05-2012

- 7) SPListX expects the user must ensure the persistent connectivity status using Web Single Sign-on dashboard. To check the status, *click* **Web SSO Dashboard** hyperlink.



## CHAPTER 4– Export SharePoint List contents using a batch descriptor file



8) Click **Finish** button to create the task.

## 5 Export SharePoint List contents using the search option

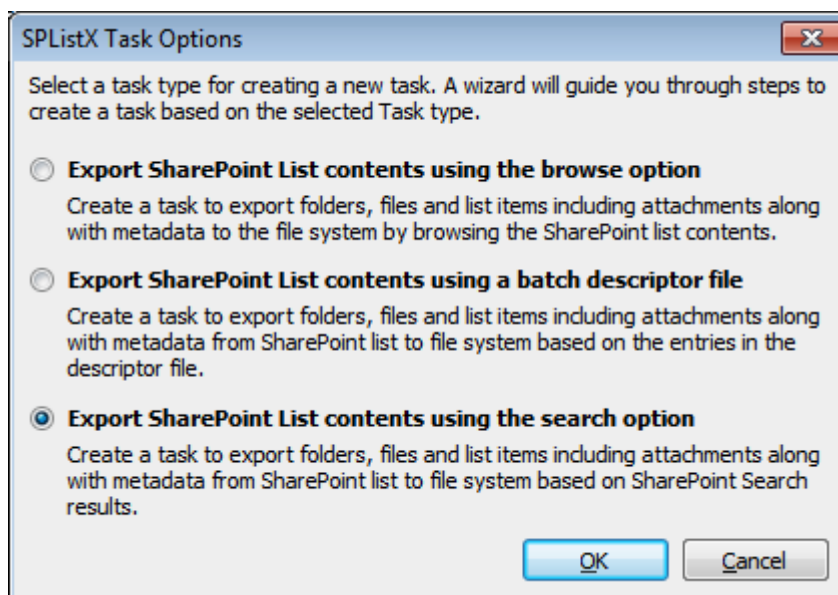
---

### 5.1 Create Task

---

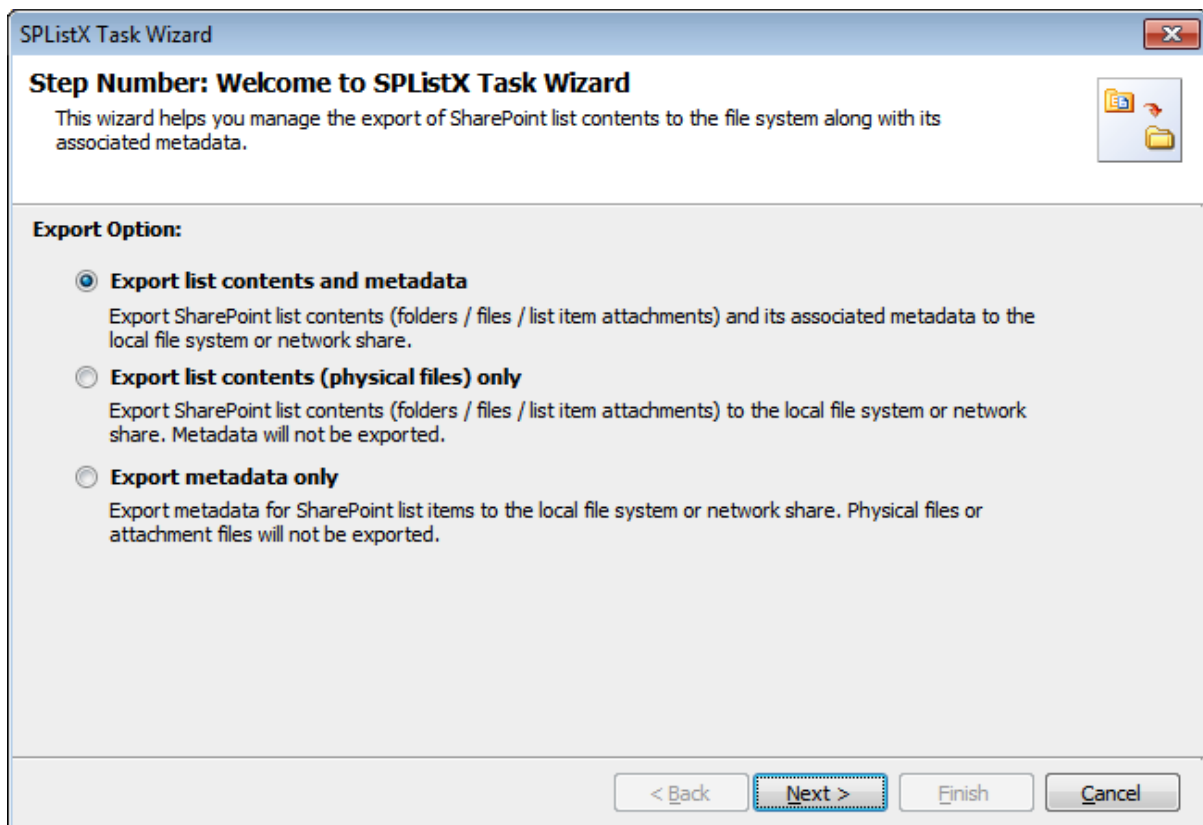
To create a task to export folders / files / list items including attachments along with their metadata from SharePoint List to file system or network share:

- 1) **Select Export SharePoint List contents using the search option** in **SPListX Task Options** dialog as shown below and click **OK**.



## CHAPTER 5 – Export SharePoint List contents using the search option

2) The **SPListX Task Wizard** appears as shown below:



- 3) Click **Next** button
- 4) Specify **SharePoint User Credential**
- 5) Specify **SharePoint URL Settings**
- 6) Specify **Search Conditions**
- 7) Specify **Column Settings Options**
- 8) Specify **Version Options**
- 9) Specify **Permission Options**
- 10) Specify **Export Conditions**
- 11) Specify **Document Packing Options**
- 12) Add **Destination folder option**
- 13) Specify **File Settings**
- 14) Specify **Metadata File Settings**
- 15) Specify **Task Settings**
- 16) Click **Finish** button to create the task, or click **Back** button to change the task settings.

### 5.2 Create Search Batch Descriptor File

---

The following section gives you the guidelines to create an external batch descriptor file for **Export SharePoint List contents using the search option** task type.

- 1) The first row of the metadata file should contain the Field Names as headers.
- 2) The first field should be named as '**Path**' and second field should be named as '**Destination Path**'.

The other field names should be separated by a delimiter character such as comma (,), semi-colon (;) etc. The delimiter character used in the external metadata file should be same as 'List Separator' defined in locale settings in 'Regional and Language Options' in Control Panel and 'Format' string value available in the registry key: (HKEY\_LOCAL\_MACHINE\SOFTWARE\Microsoft\Jet\4\Engines\Text).

The following table shows the equivalent Format string for 'List Separator' in the registry key:

List Separator	Equivalent Format String
, (comma)	CSV Delimited
; (semi-colon)	Delimited (;)
* (asterisk)	Delimited(*)

- 3) The first column of all the rows should contain the source URL of the list or folder or file or folder or list item. In other words, the source path should be either a SharePoint List URL (e.g., <http://vyapin/Shared Documents>) or sub-folder URL within SharePoint List (e.g., <http://vyapin/Shared Documents/sample folder1>) or file URL within the SharePoint List (e.g., <http://vyapin/shared documents/sample folder1/SampleDocument.doc>) or list item URL within the SharePoint List (e.g., [http://vyapin/lists/cities/1\\_.000](http://vyapin/lists/cities/1_.000))
- 4) The second column of all the rows should contain the destination folder location e.g., "C:\My Projects\" (or) \\FileServer\My Documents, where the exported item is to be stored.

## CHAPTER 5 – Export SharePoint List contents using the search option

- 5) Be consistent with the drive letters and UNC path when exporting folders, files and list item attachments from a SharePoint list. If you use local / mapped drives to export files or list item attachments, ensure the 'Destination Path' field has the corresponding local / mapped drive path (e.g., M:\My Documents). If you use shares to export file or list item attachments, ensure the 'Destination Path' field has the corresponding UNC path (e.g., \\Machine\_Name\Share\_Name).
- 6) For **CSV** and **TXT** formats, all field names and their corresponding metadata values should be enclosed within double quotes (" ") e.g., "http://vyapin/Shared Documents/sample folder1". When using accent characters such as [á é í ó] in folder / file names, the **CSV / TXT** metadata file must be in UNICODE encoded format.
- 7) For Microsoft Excel file formats (**XLSX**), you do not have to enclose the field names and their corresponding values within double quotes.

### Sample format of a CSV / TEXT batch descriptor file:

**NOTE:** Refer Point #2 for the separator to be used in the batch descriptor file

"Path", "Destination Path"

"http://vyapin/shared documents/Sample Brochure.doc", "C:\My Documents"

"http://vyapin/shared documents/sample folder1/\*", "\\vyapinfo\ExportDocs\shared doc contents"

"http://vyapin/lists/\*.\*", "C:\My Sales\Lists Backup"

"http://vyapin/lists/cities/\*.\*", "C:\My Cities\Backup"

### 5.3 SharePoint User Credential

Specify the user credential to connect to the SharePoint.

1) The **SharePoint User Credential** step appears as shown below:

SPListX Task Wizard

**Step Number: SharePoint User Credentials**  
Specify user credential to connect to SharePoint when running the export task.

**SharePoint user credential:**

☒ **Use the following credential to connect to SharePoint**  
Connect to SharePoint using the specified user credentials. SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

User name: VYAPINLAB\kevin  
(johndoe@contoso.com, contoso\johndoe, johndoe)

Password: .....

☐ **Use Web Single Sign-on credential to connect to SharePoint**  
Connect to SharePoint sites configured with ADFS as identity provider (including Office365)

< Back   Next >   Finish   Cancel

2) Specify the user's credentials to connect to the SharePoint using the options given below:

- a) **Use the following credential** - Connect to SharePoint URL using the user context Stored in the user profile (OR) Enter the user name in any ONE of the following formats: **<DOMAIN NAME>\<USER NAME>**, **UserName@DomainName**, **UserName** and its corresponding password. SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.
- b) **Use Web Single Sign-on credential to connect to SharePoint** - Connect to SharePoint URL using federated identity configured using ADFS. Use this option to connect to Office365 SharePoint Online configured using federated identity provider.

## CHAPTER 5 – Export SharePoint List contents using the search option

SPListX Task Wizard

### Step Number: SharePoint User Credentials

Specify user credential to connect to SharePoint when running the export task.

**SharePoint user credential:**

☐ **Use the following credential to connect to SharePoint**  
Connect to SharePoint using the specified user credentials. SPListX will initiate Windows authentication or Forms authentication depending on configuration in the target SharePoint site.

User name:    
(johndoe@contoso.com, contoso\johndoe, johndoe)

Password:

☒ **Use Web Single Sign-on credential to connect to SharePoint**  
Connect to SharePoint sites configured with ADFS as identity provider (including Office365)

< Back   Next >   Finish   Cancel

3) Click **Next** to Proceed.

### 5.4 Search URL Settings

You can specify the URLs to search using a batch file or select the URL using the browse button. The URLs to search narrow down the search results. For each searched URL, you can export to a different export location, if necessary.

1) The **Search URL Settings** step appears as shown below:

**SPListX Task Wizard**

**Step Number: Search URL Settings**  
This wizard helps you manage the export task settings.

☒ **Batch File**

Sheet Name:

☐ **URL to search:**


Export location:

Items to search:

<input type="checkbox"/>	URL to search	Export Location
--------------------------	---------------	-----------------

< Back   Next >   Finish   Cancel

2) If you choose **Batch File** option:

1. **Click (...)** button to select the batch descriptor file. The descriptor file can be in any one of the following file formats - Comma delimited (CSV), Microsoft Excel (XLSX) or Text file (TXT).
2. **Click**  to see a sample batch descriptor file (such as, Comma delimited (CSV) file, Excel (XLSX) file).
3. The external metadata file will be automatically extracted, once the file name is specified. If you are using Microsoft Excel based file format, then select the sheet name to use from the drop-down.
4. **Click (...)** to add a hidden sheet name Excel file in drop down.



## CHAPTER 5 – Export SharePoint List contents using the search option

**SPListX Task Wizard**

**Step Number: Search URL Settings**  
This wizard helps you manage the export task settings.

☒ **Batch File**  ... ?

Sheet Name:  ...

☐ **URL to search:**  ... ?

Export location:  ...

Items to search: ☐

URL to search	Export Location
---------------	-----------------

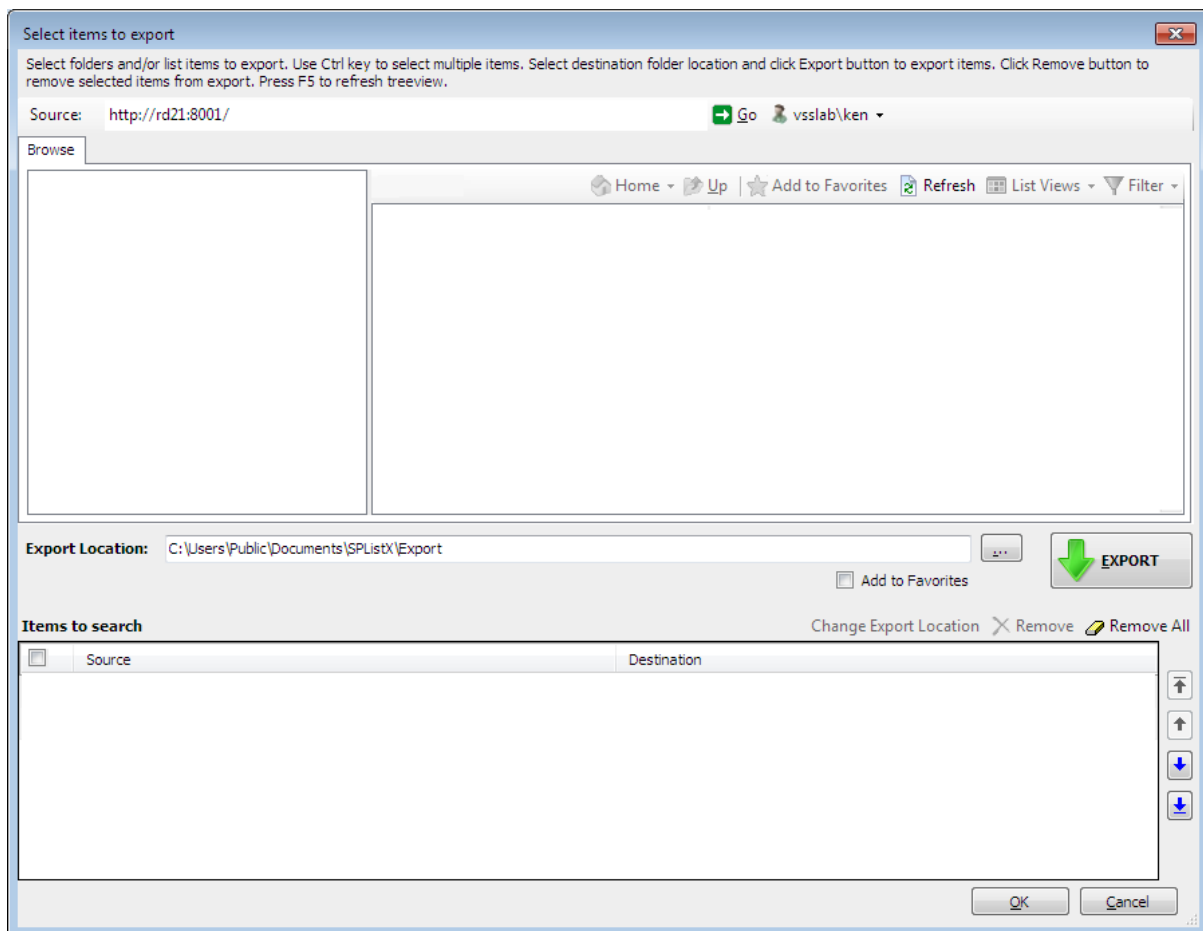
< Back Next > Finish Cancel

### 3) If you choose **URL option**:

1. Specify a valid SharePoint URL in the URL textbox. You can specify a SharePoint site or list location in the URL textbox.
2. Specify a valid Destination path in destination textbox and then click **ADD** button to add the items.
3. **Click (...)** to add the list from select items dialog.

## CHAPTER 5 – Export SharePoint List contents using the search option

4. The **Select items to export** dialog appears as shown below:



**Select items to export** dialog contains a textbox (top), tree-view (top-left) and a list-view (top-right), which provides explorer like view to select site collection lists to search.

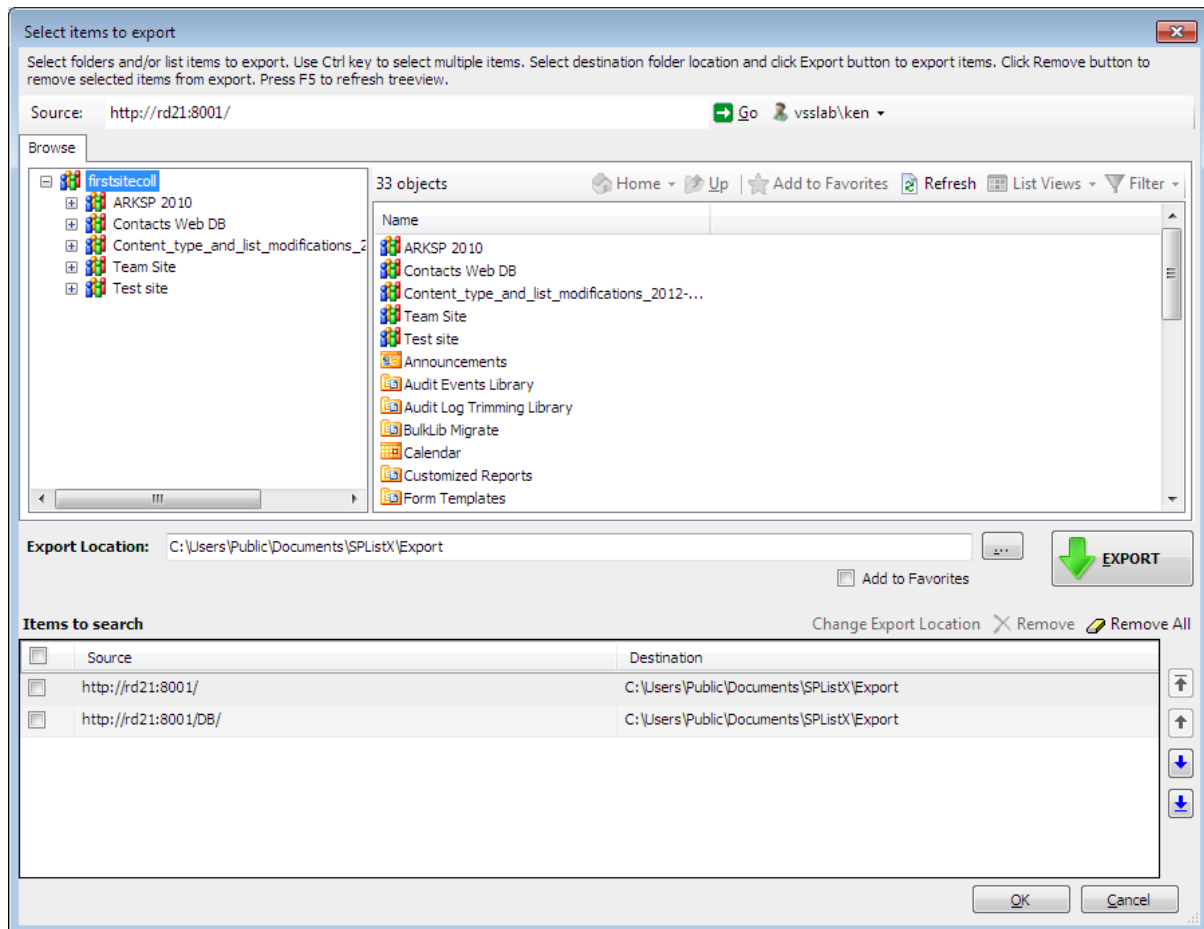
Specify a valid SharePoint URL in the source textbox and click Go button. SPListX will load the tree view of the source location.

Select a destination location using browse option or enter the destination location path in the textbox and click **Add** button to search for selected lists.

Click **OK** button to proceed or click **Cancel** to discard the changes.

## CHAPTER 5 – Export SharePoint List contents using the search option

**Items to search** contains top level site, sub-sites, document library and lists added for search as shown below:



## CHAPTER 5 – Export SharePoint List contents using the search option

**SPListX Task Wizard**

**Step Number: Search URL Settings**  
This wizard helps you manage the export task settings.

☐ Batch File

Sheet Name:

☒ URL to search:

Export location: C:\Users\Public\Documents\SPListX\Export

Items to search:

<input type="checkbox"/>	URL to search	Export Location
<input type="checkbox"/>	http://rd06:9004/SeaHorse/ReportLibrary	C:\Users\Public\Documents\SPListX\Expor
<input type="checkbox"/>	http://rd06:9004/SeaHorse/Spartans	C:\Users\Public\Documents\SPListX\Expor
<input type="checkbox"/>	http://rd06:9004/SeaHorse/Shared Documents	C:\Users\Public\Documents\SPListX\Expor

Click **Next** to Proceed.

### 5.5 Search Conditions

**SPListX** will search for list items in SharePoint list based on search conditions. The conditions can be created using SharePoint Managed properties.

**1) The Search Conditions** step appears as shown below:

**SPListX Task Wizard**

**Step Number: Search Conditions**  
This wizard helps you manage the export task settings.

All of these words:  Any of these words:   
The Exact phrase:  None of these words:   
Result Type:  Scope:

**Narrow the search**

Property:  ...  
Operator:  Logical operator: ☒ And ☐ Or  
Value:

**Property restrictions:**

**2)** Define search keywords in appropriate textboxes to search for the content indexed at Farm level. For example, search for the keyword "SharePoint" in "The Exact Phrase text box"

## CHAPTER 5 – Export SharePoint List contents using the search option

**SPListX Task Wizard**

**Step Number: Search Conditions**

This wizard helps you manage the export task settings.

All of these words:  Any of these words:

The Exact phrase:  None of these words:

Result Type:  Scope:

**Narrow the search**

Property:  ...

Operator:  Logical operator: ☒ And ☐ Or

Value:

**Property restrictions:**

**Result Type - Result** Type will narrow down the search results. By default, SPListX will search for all list items of all list types. For ex, If you want to narrow down your search results only for documents, select "All Documents" type in result type.

**Scope** - Scopes will narrow down the search results returned to search query. It can be either shared (Farm level) or locally defined (Site level). Scopes can be defined by specifying different rules using custom metadata on content source.

- 3) Click (...) button to add the SharePoint managed properties in properties drop-down. The **Add Managed Properties Dialog** as shown below:

**Add Managed Properties Dialog**

Name:

Type:

Column Name	Column Type
AssignedTo	Text
DocKeywords	Text

## CHAPTER 5 – Export SharePoint List contents using the search option

Specify the managed property name in Name textbox and select the data type of the column in SharePoint from Type drop-down.

Before adding managed properties, Please ensure the followings:

- i) Specified managed property exists in Shared Services Provider.
- ii) Data type matches exactly.

Click **Add** button to *add* the managed property to the property drop-down.

Click **Remove** button to *remove* the columns from the property drop-down.

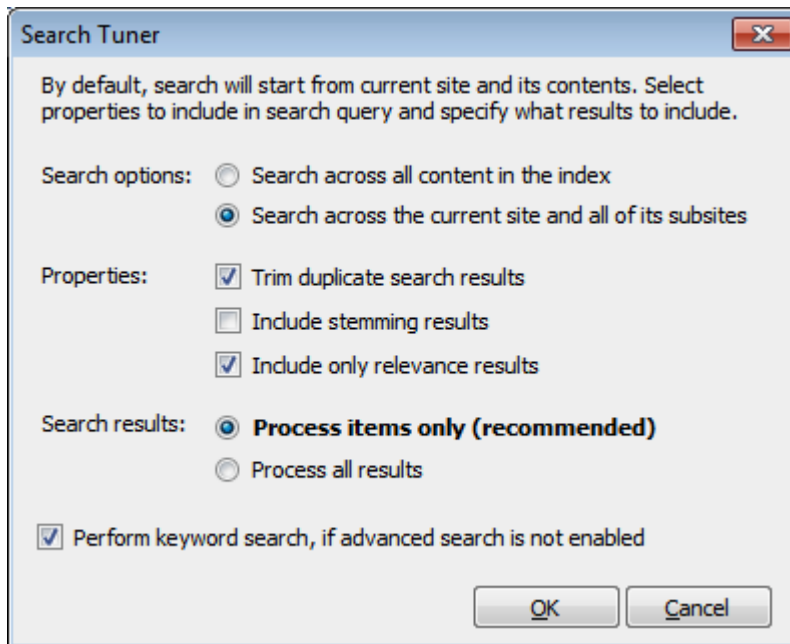
- 4) You can specify the conditions by selecting the property name and by specifying a corresponding value with the necessary operator. You can use mathematical operators such as **>**, **=**, **>=** etc. to define your query. Complex queries can be constructed by using logical operator **'AND'** or **'OR'**.

The screenshot shows the 'SPListX Task Wizard' window, specifically the 'Step Number: Search Conditions' screen. The window has a title bar with the text 'SPListX Task Wizard' and a close button. Below the title bar, the text 'Step Number: Search Conditions' is displayed, followed by a subtitle 'This wizard helps you manage the export task settings.' and a small icon of a folder with a red arrow. The main area contains several input fields and buttons. On the left, there are three rows of input fields: 'All of these words:' with the value 'Share Point', 'The Exact phrase:' which is empty, and 'Result Type:' with a dropdown menu showing 'All Results'. To the right of these are three more input fields: 'Any of these words:' which is empty, 'None of these words:' which is empty, and 'Scope:' which is empty. Below these fields is a section titled 'Narrow the search'. It contains a 'Property:' dropdown menu with 'Author' selected, an 'Operator:' dropdown menu with '=' selected, and a 'Value:' text box with 'John Doe'. To the right of the 'Property:' dropdown is a small '...' button. To the right of the 'Operator:' dropdown is a 'Logical operator:' section with two radio buttons: 'And' (selected) and 'Or'. To the right of the 'Value:' text box is an 'Add' button. Below the 'Narrow the search' section is a 'Property restrictions:' section with a large text box containing the query '[Author] = 'John Doe''. To the right of this text box are two small icons: a red 'X' and a yellow notepad. At the bottom of the 'Property restrictions:' section are two buttons: 'Search Tuner...' and 'Trial Search...'. At the very bottom of the window are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

- 5) You can fine tune the search results by clicking **Search Tuner** button.

The **Search Tuner** *dialog* appears as shown below:

## CHAPTER 5 – Export SharePoint List contents using the search option



### a) Search Options:

*Search across all content in the index* - SPListX will search for list items content, properties across all the content indexed at farm level.

*Search across the current site and all of its sub-site* - By default, SPListX will search for list items contents and properties at current site and underneath. Current site indicates that site URL specified.

### b) Properties:

*Trim duplicate search results* - This option will remove the duplicate item Urls from search results.

*Include stemming results* - This option will not include the stemming results. If you enable stemming, search results will bring back words related to search keywords.

For ex: If you search for keyword "run". Search results will bring back words matches like "runs", "running".

*Include only relevance results* - This option will include only relevance results in search results. Relevance will bring the search results closely related to the search query.

### c) Search results:



## CHAPTER 5 – Export SharePoint List contents using the search option

**Process only items (recommended)** - This option will search for list items only.

**Process all results** - This option will include all list view URLs, site URLs in search results. But, export process engine will ignore the site URLs, List view URLs for export.

### d) Perform keyword search, if advanced search is not enabled

In WSS 3.0, advanced search is not enabled. If you want to perform search for the WSS 3.0 sites, SPListX will ignore all the **properties, scopes and result types** specified in **search query**. Keyword search query is framed based on the keywords specified in All Keywords textbox, Any Keywords textbox, Exact Phrase textbox.

**Click OK** to proceed.

- 6) Click **Trial Search** button to invoke Trial Search tool. The Trial Search tool will help you perform a live search against the keywords and help you verify the search results.

The **Trial Search Dialog** appears as shown below:

Trial Search

Trial search tool will help you perform a live search to verify the search results.

URL:

Sign-in as:  Search

Back Next

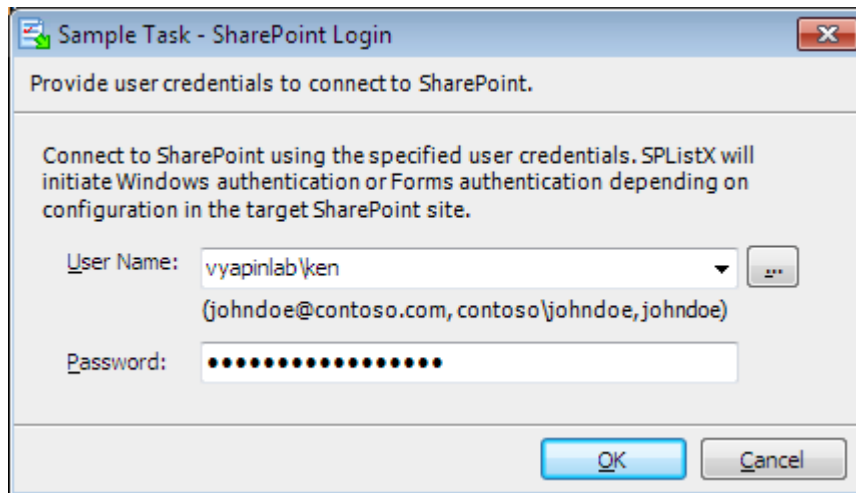
Title	Path
-------	------

Note: Double click on results to launch the URL in your browser.

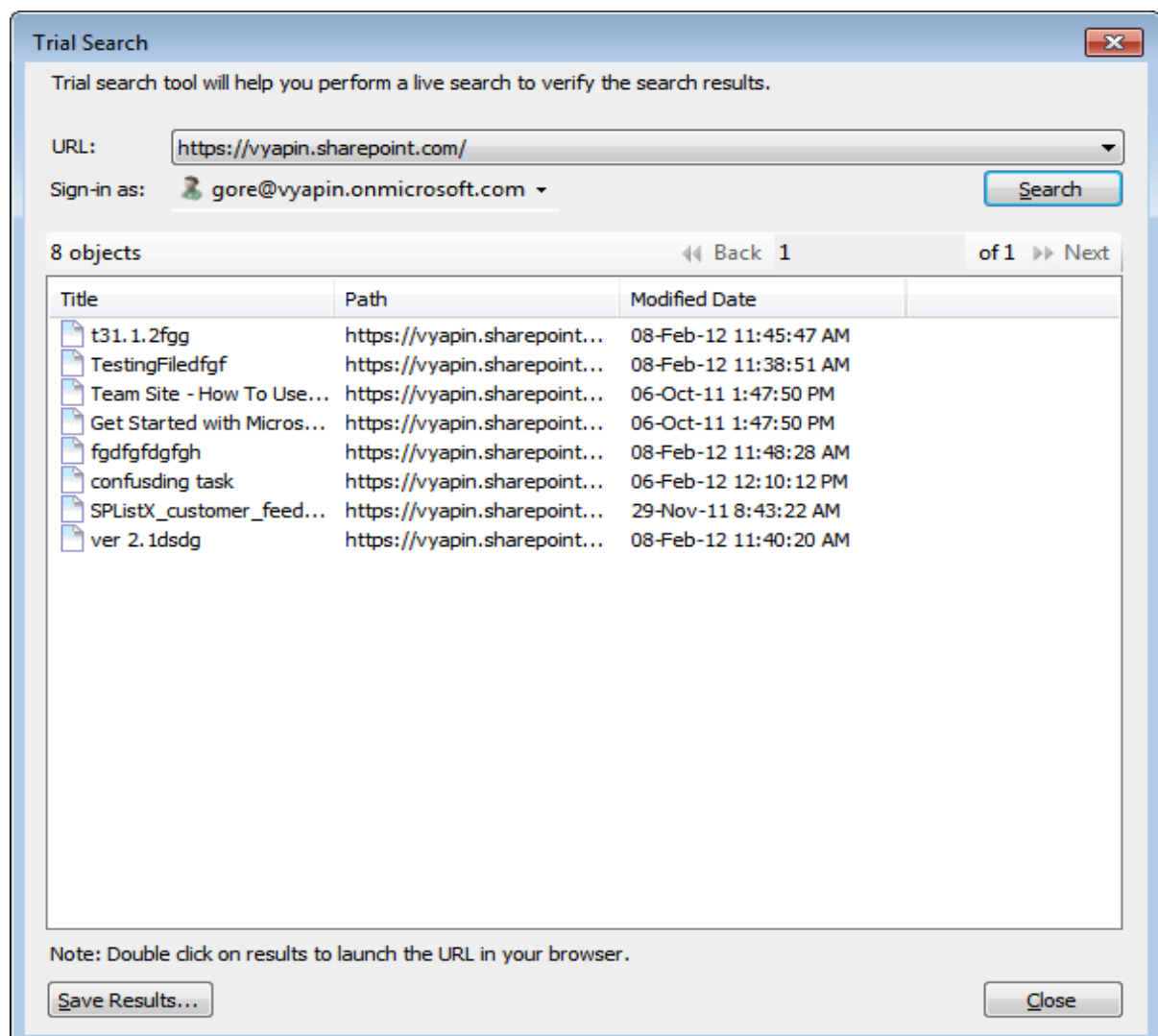
Save Results... Close

## CHAPTER 5 – Export SharePoint List contents using the search option

- a) Select URL from the **URL** drop-down.
- b) The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid **user credential** to connect to SharePoint.



- c) Click **Search** button to perform search.



## CHAPTER 5 – Export SharePoint List contents using the search option

Click **Save Results** button to save the search results in CSV or Excel format.

Click **Close button** to close the dialog.

The screenshot shows the 'SPListX Task Wizard' dialog box, specifically the 'Step Number: Search Conditions' screen. The title bar reads 'SPListX Task Wizard'. Below the title, the text 'Step Number: Search Conditions' is displayed, followed by a subtitle: 'This wizard helps you manage the export task settings.' In the top right corner, there is a small icon of a folder with a red arrow pointing to it. The main area of the dialog is divided into several sections. The first section contains four input fields: 'All of these words:' with the text 'Share Point', 'Any of these words:' (empty), 'The Exact phrase:' (empty), and 'None of these words:' (empty). Below these is a 'Result Type:' dropdown menu set to 'All Results' and a 'Scope:' input field (empty). The second section is titled 'Narrow the search' and contains a 'Property:' dropdown menu set to 'Author', an 'Operator:' dropdown menu set to '=', and a 'Value:' input field containing 'John Doe'. To the right of the 'Property:' dropdown is a small '...' button. To the right of the 'Operator:' dropdown is a 'Logical operator:' section with two radio buttons: 'And' (selected) and 'Or'. Below the 'Value:' input field is an 'Add' button. The third section is titled 'Property restrictions:' and contains a text area with the text '[Author] = 'John Doe''. To the right of the text area are two buttons: a red 'X' button and a yellow notepad icon. Below the text area are two buttons: 'Search Tuner...' and 'Trial Search...'. At the bottom of the dialog, there are four buttons: '< Back', 'Next >', 'Finish', and 'Cancel'.

**8)** Click **Next** to proceed.

### 5.6 Column Settings Options

To selectively export metadata columns from the SharePoint list:

- 1) The **Column Settings Options** step appears as shown below:

**SPListX Task Wizard**

**Step Number: Column Settings Options**

Specify the SharePoint columns you wish to export. By default, all user defined SharePoint columns will be exported.

Column Settings:

- ☐ Do not export columns
- ☐ Export all columns
- ☒ Export all user defined columns
- ☐ Export selected columns

<Type column names here >

Examples:

Title  
Description  
Author

Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.

< Back   Next >   Finish   Cancel

- 2) Select any one of the following metadata settings:
  - **Do not export columns** - This option does not export columns.
  - **Export all columns** - Exports all columns available in the source SharePoint list, including SharePoint system columns such as Created, Modified, Approval Status, etc.
  - **Export all user defined columns** - Exports all columns that are created by a SharePoint user
  - **Export selected columns** - Exports columns that are specified in the textbox

## CHAPTER 5 – Export SharePoint List contents using the search option

**SPListX Task Wizard**

**Step Number: Column Settings Options**

Specify the SharePoint columns you wish to export. By default, all user defined SharePoint columns will be exported.

Column Settings:

- ☐ Do not export columns
- ☐ Export all columns
- ☐ Export all user defined columns
- ☒ Export selected columns

Title  
Created By  
Approval Status

Enter one column name per line. Ensure the column name entered here exactly matches the display name of the SharePoint column.

< Back   Next >   Finish   Cancel

Click **Next** to Proceed.

### 5.7 Version Options

To selectively export list item versions to the destination file system location:

1) **The Version Options** step appears as shown below:

**Export Versions:**

- ☒ All versions
- ☐ Export version range: Start:  End:
- ☐ Export version date range: Start:  End:
- ☐ Export major versions only
- ☐ Latest version only

**File Version Handling:**

- ☒ Export each file version to a version folder named as
- ☐ Store latest version in root folder
- ☐ Store latest version in the respective version folder
- ☐ Export each file version as separate files named as

< Back Next > Finish Cancel

2) **Export Versions:**

By default, **All versions** option is selected. Item version settings will be used for each of the list items exported from the list. Select any one of the following version settings:

- a) **All versions** - Export all list item versions available in the source list.
- b) **Export version range** - Export only list item versions specified in the range from the source list e.g., versions 2 to 5.
- c) **Export version date range** - Export only list item versions by date specified in the range from the source list e.g., versions date 11/19/2010 - 15/19/2010. The source list date used for exporting is **Modified date** of a list item.
- d) **Export major versions only** - Export the major list item version from the source.
- e) **Latest version only** - Export the latest list item version from the source.

### 3) File Version Handling:





**SPListX Task Wizard - Sample Task**

**Step Number: Version Options**  
Specify the list item versions to export. By default, latest version of the list item will be exported.

**Export Versions:**

- ☒ All versions
- ☐ Export version range: Start:  End:
- ☐ Export version date range: Start:  ☐ End:
- ☐ Export major versions only
- ☐ Latest version only

**File Version Handling:**

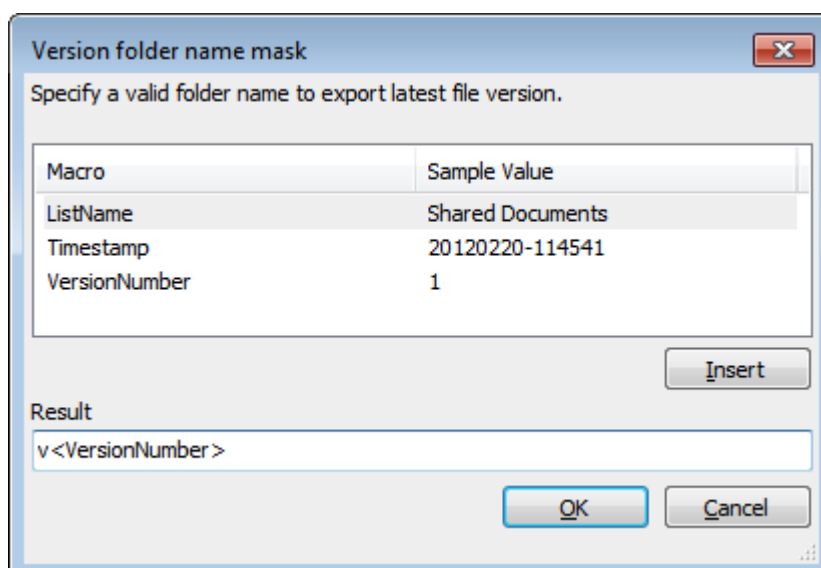
- ☒ Export each file version to a version folder named as   
- ☒ Store latest version in root folder
- ☐ Store latest version in the respective version folder
- ☐ Export each file version as separate files named as   

< Back   Next >   Finish   Cancel

Select any one of the following export options:

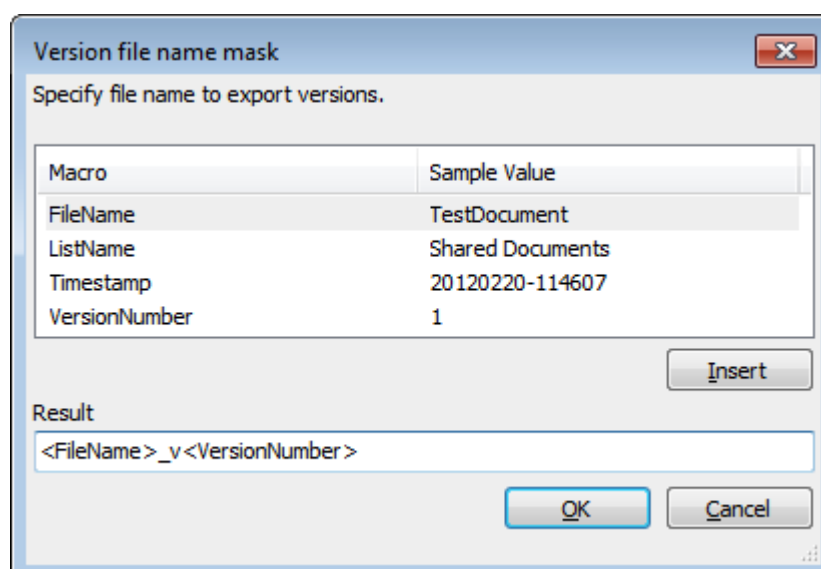
- a) Export each version to a version folder named as** - This option will create a version folder for each file version based on the version folder name specified in the folder name mask textbox. You have the option to export the latest file version to the root folder or export it to the respective version folder.
  - i. Store latest version in root folder** – Export the latest file version to the root folder specified by the user. To select Version folder name, click the button placed next to the export version to as version folder name textbox. Version folder name mask dialog appears as shown below:

## CHAPTER 5 – Export SharePoint List contents using the search option



You can use the available macros to construct the new folder name in the **Result** textbox.

- ii. **Store latest version in the respective version folder** - This option will create a version folder name based on the current file version and export the file into the version folder.
- b) **Export each file version as separate files named as** - Each file version will be exported using the file version name constructed in the file version name mask text box. To select **Version file name**, click the button placed next to the export version to a separate file name textbox. Version file name mask dialog appears as shown below:



You can use the available macros to construct the new file name in the **Result** textbox.

- 4) Click **Next** to proceed.



## CHAPTER 5 – Export SharePoint List contents using the search option

For **Latest Version Only** option in the Export Versions, you have the option to export the latest file version to the root folder or export it to the respective version folder. The File Version Handling settings appear as shown below:

The screenshot shows a Windows-style dialog box titled "SPListX Task Wizard - Sample Task". The main heading is "Step Number: Version Options" with a subtitle "Specify the list item versions to export. By default, latest version of the list item will be exported." In the top right corner, there is an icon of a folder with a red arrow pointing into it. The dialog is divided into two main sections: "Export Versions:" and "File Version Handling:". Under "Export Versions:", there are five radio button options: "All versions", "Export version range:" (with "Start:" and "End:" text boxes), "Export version date range:" (with "Start:" and "End:" dropdown menus, the "Start:" dropdown is set to "20-Feb-12"), "Export major versions only", and "Latest version only" (which is selected). Under "File Version Handling:", there are two radio button options: "Store latest version in root folder" (which is selected) and "Store latest version to a version folder named as" (with a text box containing "v<VersionNumber>" and an information icon). At the bottom of the dialog, there are four buttons: "< Back", "Next >", "Finish", and "Cancel".

- a) **Store latest version in root folder** - Export the latest version in the root folder itself
- b) **Store latest version in the respective version folder** - Creates a latest version folder and export the latest file version in the latest version folder

### 5.8 Permission Options

**SPListX** can export SharePoint site / list / list item permission information to the metadata file. This feature works only for SharePoint 2010 environment.

1) The **Permission options** specification wizard step appears as shown below:

**SPListX Task Wizard - Sample Task**

**Step Number: Permission Options (Works only for SharePoint 2010)**  
Export site / list / item permission from SharePoint file to the metadata file.

**Export Permissions:**

☒ Do not export permissions

☐ Export permissions

Export permissions for: ☐ Site ☐ List ☒ List item

Permission format:

☒ User - Role format (e.g., johndoe: Full Control)

☐ Role - User format (e.g., Full Control: johndoe)

Inheritance status:

☐ Export inheritance status as separate column (shows if the permission is Unique or Inherited)

Membership information:

☐ Export membership information and role definition to a separate XML file

< Back Next > Finish Cancel

#### Export Permissions:

- a) **Do not export permissions** - This option will not export permissions to the metadata file.
- b) **Export permissions** - This option will export permissions based on the user specified options.

## CHAPTER 5 – Export SharePoint List contents using the search option

The *export permission options* appear as shown below:

SPListX Task Wizard - Sample Task

**Step Number: Permission Options (Works only for SharePoint 2010)**

Export site / list / item permission from SharePoint file to the metadata file.

**Export Permissions:**

☐ Do not export permissions

☒ Export permissions

Export permissions for: ☒ Site ☒ List ☒ List item

Permission format:

☒ User - Role format (e.g., johndoe: Full Control)

☐ Role - User format (e.g., Full Control: johndoe)

Inheritance status:

☒ Export inheritance status as separate column (shows if the permission is Unique or Inherited)

Membership information:

☒ Export membership information and role definition to a separate XML file

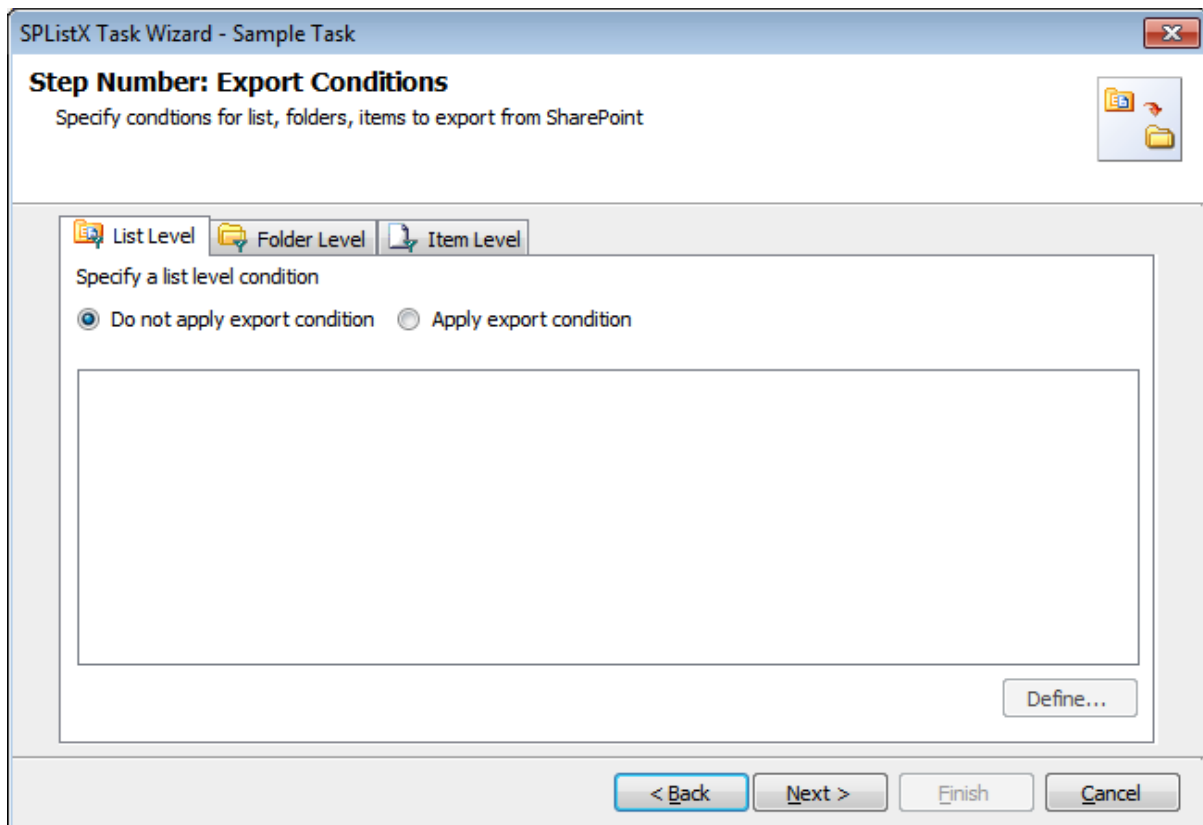
< Back Next > Finish Cancel

- 2) You can export permissions for **Site / List / List item** to the metadata file depending on the user selection. Check appropriate checkboxes in **Export permission for:** options.
- 3) Specify the **Permission format** to use when exporting the permission information for the Site / List / List item to the metadata file using the options given below:
  - a) **User - Role format** – Exports permission details as User – Role e.g., johndoe: Full Control, Limited Access; johnsmith: Read, View Only etc.
  - b) **Role - User format** – Exports permission details as Role – User e.g., Full Control: johndoe, johnsmith; Contributor: janedoe etc.
- 4) **Inheritance status** - Export the inheritance status of the Site / List / List item as a separate column / field in the metadata file. This column / field indicate if the permission is 'Inherited or Unique' role assignment at the Site / List / List item level in SharePoint.
- 5) **Membership information** - This option exports membership and role definition information to separate XML files. These XML files are stored in the same location as the metadata files in the name `_membershipinformation` and `_roledefinition`. The user account that connects to SharePoint must have (System Account) permission to retrieve respective membership information. Similarly, the user account specified in Active Directory Profile Manager for each domain must have (Domain Admin) permission to retrieve respective membership information.
- 6) Click **Next** to Proceed.

### 5.9 Export Conditions

**SPListX** can export folders, files and list items including attachments from SharePoint list based on certain export conditions. The conditions can be created by using SharePoint columns in the source list.

1) **The Export Conditions** step appears as shown below:



2) You can specify export conditions at **three levels**:

- List Level
- Folder Level
- List Item Level

3) **List Level Conditions**

Select any one of the following options given below:

- **Do not apply any conditions** - No conditions will be used to filter lists.
- **Apply the following conditions** - The conditions specified will be used to filter lists taken for export from source SharePoint List.

4) **Click Define** to specify the conditions

## CHAPTER 5 – Export SharePoint List contents using the search option

**The List Export Conditions Dialog** appears as shown below:

The screenshot shows a dialog box titled "List Export Condition" with a close button (X) in the top right corner. Below the title bar, there is a text box containing the instruction: "Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export list only when [List Type' = 'Document Library']".

Below the instruction, there are three dropdown menus labeled "Field Name", "Operator", and "Value". Below these dropdowns are two buttons: "Add to Filter" and "'OR' to Filter".

Below these buttons is a section labeled "Conditions:" with a toolbar containing icons for opening parenthesis '(', closing parenthesis ')', logical AND '&', logical OR '|', logical NOT '!', and a delete icon. Below the toolbar is a large empty text area for defining conditions.

At the bottom of the dialog, there is a label "Export list items if the above condition is" followed by two radio buttons: "satisfied" (which is selected) and "not satisfied". At the very bottom are "OK" and "Cancel" buttons.

- 5) You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =, <> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.

## CHAPTER 5 – Export SharePoint List contents using the search option

**List Export Condition**

Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export list only when [List Type] = [Document Library].

Field Name: Base Type

Operator: =

Value: Document Library

'AND' to Filter    'OR' to Filter

Conditions:

[Base Type] = 'Document Library'

Export list items if the above condition is ☒ satisfied ☐ not satisfied

OK    Cancel

6) SPLiX will export the lists that satisfy the export condition or export the lists that do not satisfy the export condition depending on the option selected by the user:

- **Export list items if the above conditions are satisfied** - Lists that satisfy the condition will be marked for export.
- **Export list items if the above conditions are not satisfied** - Lists that do not satisfy the condition will be marked for export.

### 7) Folder Level Conditions

Select any one of the following options given below:

- **Do not apply any conditions** - No conditions will be used to filter folders.
- **Apply the following conditions** - The conditions specified will be used to filter folders taken for export from source SharePoint List.

## CHAPTER 5 – Export SharePoint List contents using the search option

- 8) Click **Define** to specify the conditions

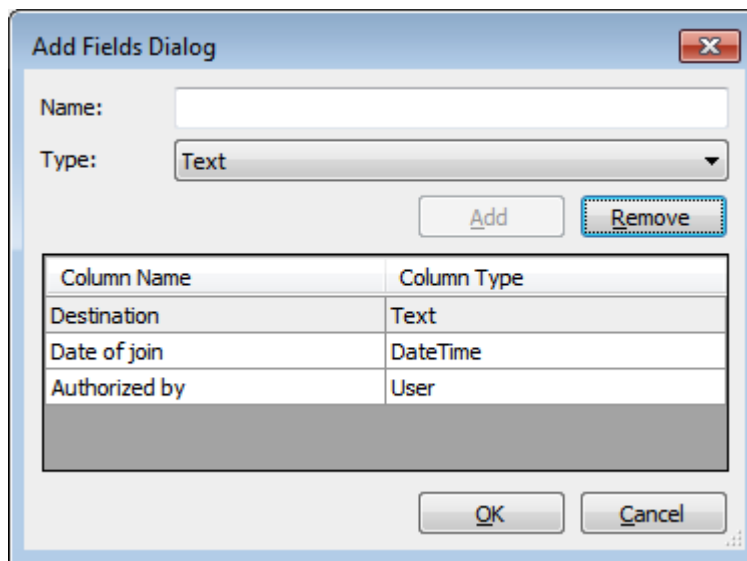
The **Folder Export Conditions Dialog** appears as shown below:

The screenshot shows the 'Folder Export Condition' dialog box. At the top, there is a title bar with a close button. Below the title bar, a text box contains the instruction: 'Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export folder only when [Created By' = 'john doe']'. The main area of the dialog has three input fields: 'Field Name' with a dropdown menu and a '...' button to its right, 'Operator' with a dropdown menu, and 'Value' with a dropdown menu. Below these fields are two buttons: 'Add to Filter' and ''OR' to Filter'. A horizontal line separates these from the 'Conditions:' section, which features a large empty text area for defining the rule. Above this text area are several icons: a left parenthesis '(', a right parenthesis ')', a delete icon (an 'X' inside a circle), a copy icon, a paste icon, and an eraser icon. At the bottom of the dialog, there is a label 'Export list items if the above condition is' followed by two radio buttons: 'satisfied' (which is selected) and 'not satisfied'. Finally, there are 'OK' and 'Cancel' buttons at the bottom right.

- 9) Click **(...)** button to *add* the SharePoint columns in Field Name dropdown.

## CHAPTER 5 – Export SharePoint List contents using the search option

The **Add Fields Dialog** appears as shown below:



Column Name	Column Type
Destination	Text
Date of join	DateTime
Authorized by	User

Specify the column name in **Name** textbox and select the data type of the column in SharePoint from **Type drop-down**.

Click **Add** button to add the columns to the fieldname dropdown list.

Click **Remove** button to remove the columns from the fieldname dropdown list.

- 10)** You can specify the export conditions by selecting the field name and by specifying a value with necessary operator.

You can use mathematical operators such =, <> to define your query. Complex queries can be constructed with the use of left-right parenthesis '(' and ')' and logical operators 'AND' and 'OR'.



## CHAPTER 5 – Export SharePoint List contents using the search option

Folder Export Condition

Specify rule that must be satisfied before exporting item from SharePoint. For example, you can export folder only when [Created By] = 'john doe'.

Field Name: Created Date

Operator: <=

Value: 01-Jan-12

'AND' to Filter   'OR' to Filter

Conditions:

[Created Date] <= #01-Jan-12#

Export list items if the above condition is ☒ satisfied ☐ not satisfied

OK Cancel

**11)** SPListX will export the folders that satisfy the export condition or export the folders that do not satisfy the export condition depending on the option selected by the user:

- **Export list items if the above conditions are satisfied** - Folders that satisfy the condition will be marked for export.
- **Export list items if the above conditions are not satisfied** - Folders that do not satisfy the condition will be marked for export.

### **12) List Item Level Conditions**

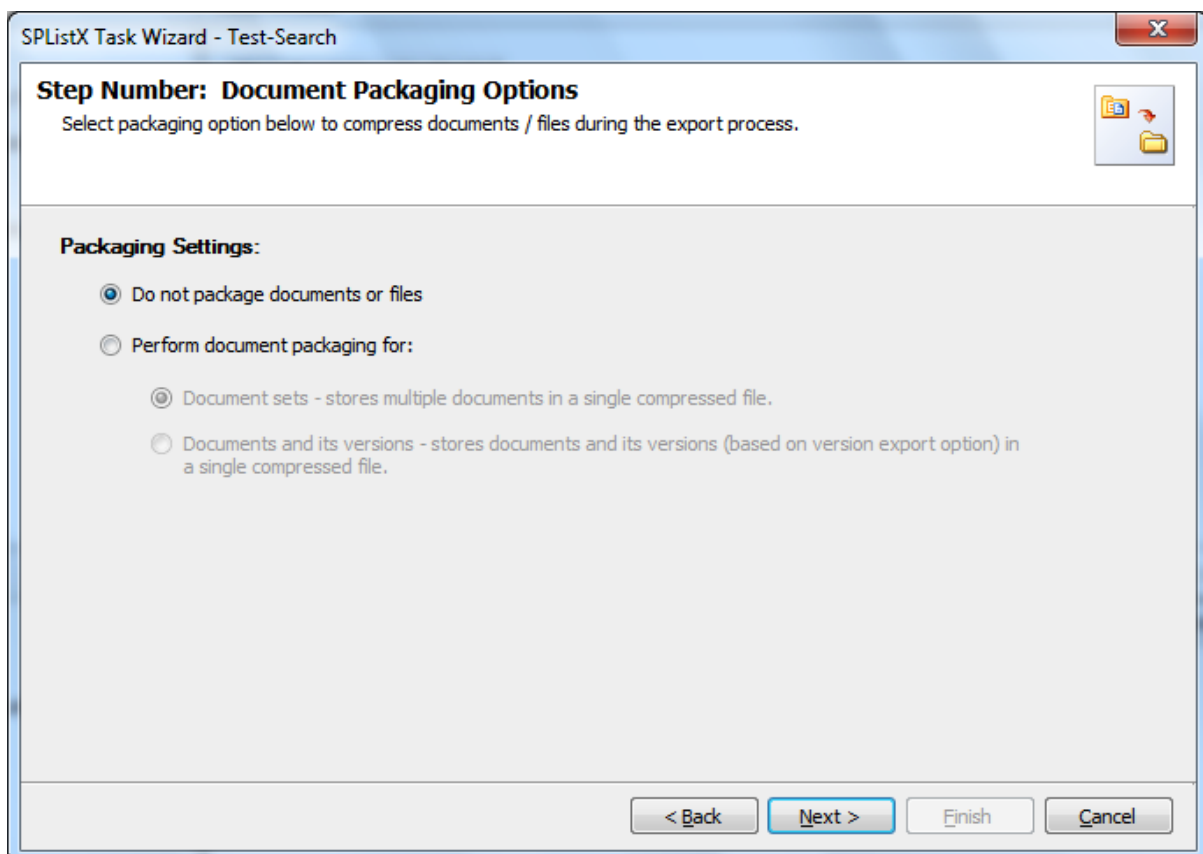
*Same as Folder Level Conditions*

**13)** Click **Next** to proceed.

### 5.10 Document Packaging Options

Document Packaging helps in storing related documents / contents together in a single file in compressed format. SPListX has the provision to export document sets and document / file versions as packaged contents grouped together. Follow the steps outlined below to store multiple document versions and document sets grouped together in the file system / file share.

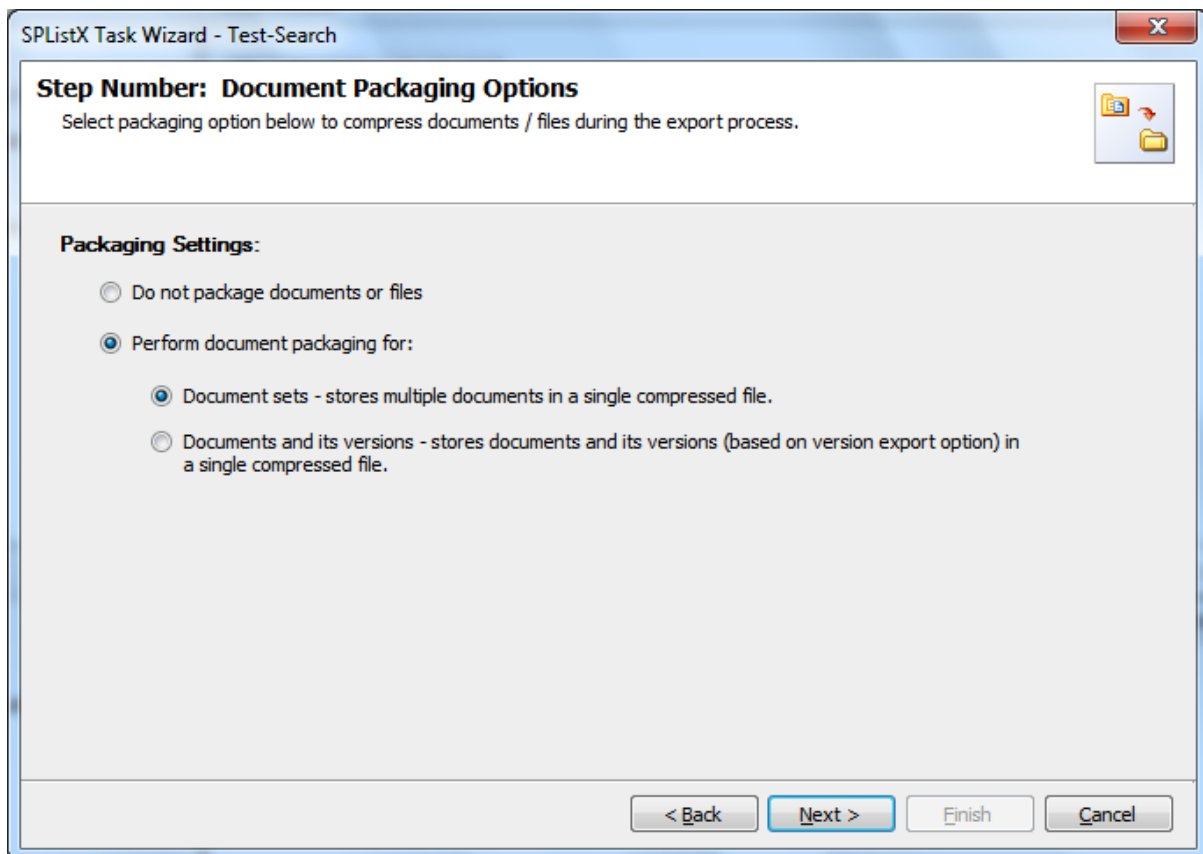
**1) The Document Packaging Options step appears as shown below:**



**2) Select Packaging Settings from the options outlined below:**

- a) Do not package documents or files:** SPListX will not package the exported documents or files.
- b) Perform document packaging for:** Document package will be created for each exported document set or file version based on the option selected below. If the file already exists in the package, File Settings options will be applied.

## CHAPTER 5 – Export SharePoint List contents using the search option



- i. **Document sets** - This option will package all files stored in the document sets into a single compressed file. The package is created in the same name as the document set.
  - ii. **Documents and its versions** - This option will package the documents and its associated versions into a single compressed file. The package is created in the same name as original document or file. The document's versions are exported into the created package based on the settings specified in Versions Settings wizard step.
- 3) Click Next to Proceed to the Next Step.

### 5.11 Destination Folder Options

**SPListX** will create destination folders based on the following options given below.

- 1) **The Destination Folder options** specification wizard step appears as shown below:

**SPListX Task Wizard - Sample Task**

**Step Number: Destination Folder Options**  
Specify folders settings to use when creating folders in file system.

Do you want to create current timestamp folder under destination location? ☐ Yes ☒ No ⓘ

Do you want to create the top-level folder(s) included for export? ☒ Yes ☐ No ⓘ

Do you want to create destination folder path if it does not exist? ☒ Yes ☐ No ⓘ

Do you want to create a folder for the list or folder underneath, when its contents are empty? ☒ Yes ☐ No ⓘ

Do you want to create separate folder for storing attachments? ☒ Yes ☐ No ⓘ

Attachment Folder Tag:  ⓘ

< Back Next > Finish Cancel

- 2) **Select from the following options:**

- a) **Do you want to create current timestamp folder under destination location?** - This option creates timestamp folder under the specified destination location. This option may be useful when scheduling the export process or when repeated exporting contents to the same destination location. Select the appropriate option to create the timestamp folder by selecting the option (Yes/No).
- b) **Do you want to create top-level folder(s) included for export?** - The top-level folder is the folder added or specified for export by the user. SPListX will commence the export process from this top-level folder. Select the appropriate option to create the top-level folder by selecting the option (Yes/No).
- c) **Do you want to create destination folder path if it does not exist?** - This option creates the full folder path in the destination location, if the

## CHAPTER 5 – Export SharePoint List contents using the search option

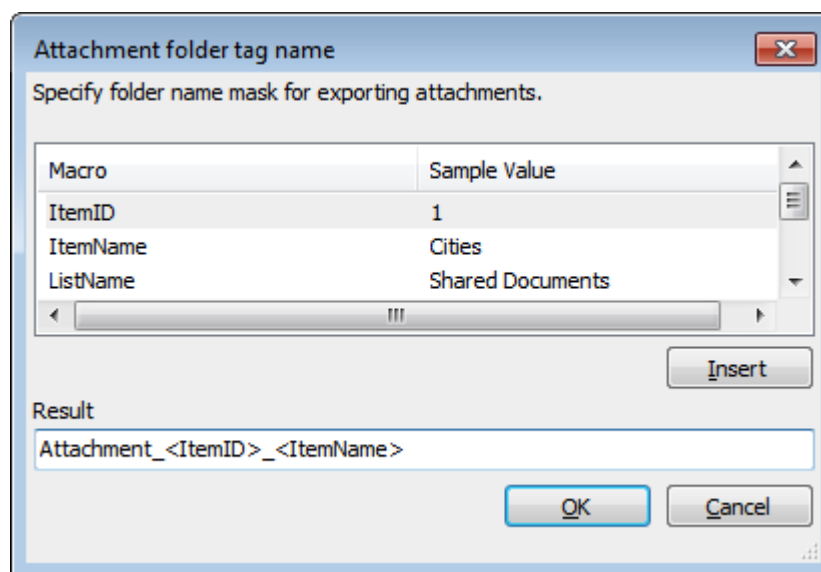
specified path is not available in the specified location by selecting the option yes.

**d) Do you want to create a folder for the list or folder underneath, when its contents are empty?** - This option creates the folder in the destination location, if the source list or folder contents are empty. Select the appropriate option to create the folder by selecting the option (Yes/No).

**e) Do you want to create separate folder for storing attachments?** - This option creates separate folder for storing attachments under the specified destination location by selecting the option (yes/No).

**3)** You can create separate folder for storing file attachments associated with list items. The folder / file naming option will be useful when list item attachments have the same name. You have the option to select an attachment folder or file naming convention to use when exporting list item attachments.

The attachment folder will be named based on the folder naming convention specified by the user. To select attachment folder naming mask, click the button placed next to the **attachment folder tag name** text box. This *dialog* appears as shown below:





Construct attachment folder name with the available mask provided in the dialog. Click OK to close the dialog. The constructed folder name mask will be placed in attachment folder naming tag textbox as shown below. Attachments will be exported to the resultant folder name mask value.


## CHAPTER 5 – Export SharePoint List contents using the search option


SPListX Task Wizard - Sample Task


**Step Number: Destination Folder Options**  
Specify folders settings to use when creating folders in file system.



Do you want to create current timestamp folder under destination location? ☐ Yes ☒ No 

Do you want to create the top-level folder(s) included for export? ☒ Yes ☐ No 

Do you want to create destination folder path if it does not exist? ☒ Yes ☐ No 

Do you want to create a folder for the list or folder underneath, when its contents are empty? ☒ Yes ☐ No 

Do you want to create separate folder for storing attachments? ☒ Yes ☐ No 

Attachment Folder Tag:   

< Back Next > Finish Cancel

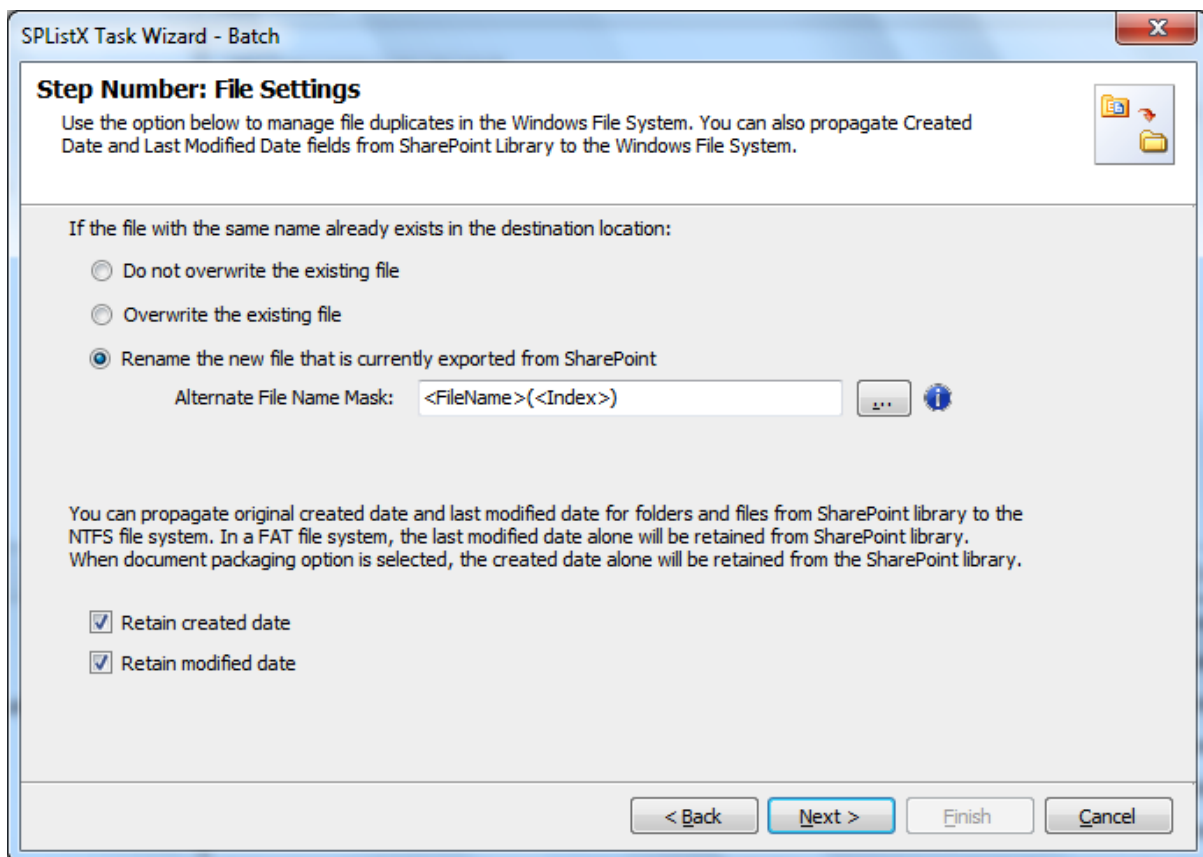
4) Click **Next** to proceed.

### 5.12 File Settings

To construct Alternate File Mask and to propagate created Date and Modified Date from SharePoint Library to Windows File System, use below options:

#### 1) Alternate File Name Mask

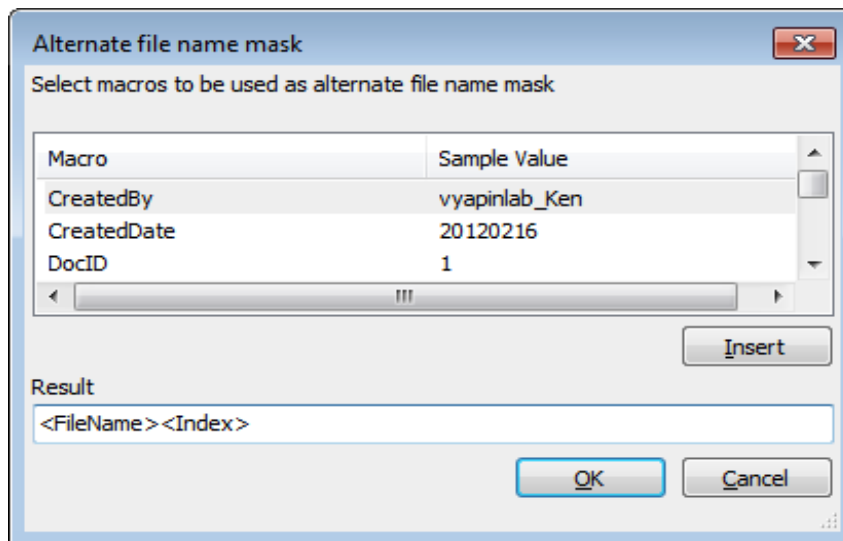
If the file with the same name already exists in the destination location, follow the steps outlined below:



- a) Do not overwrite the existing file** - Skips the file without overwriting the existing file with the same name.
- b) Overwrite the existing file** - Deletes the file from the destination location and exports the current source file.
- c) Rename the new file that is currently exported from SharePoint** - Rename the file based on the file name mask specified in the Alternate File Name Mask text box.

## CHAPTER 5 – Export SharePoint List contents using the search option

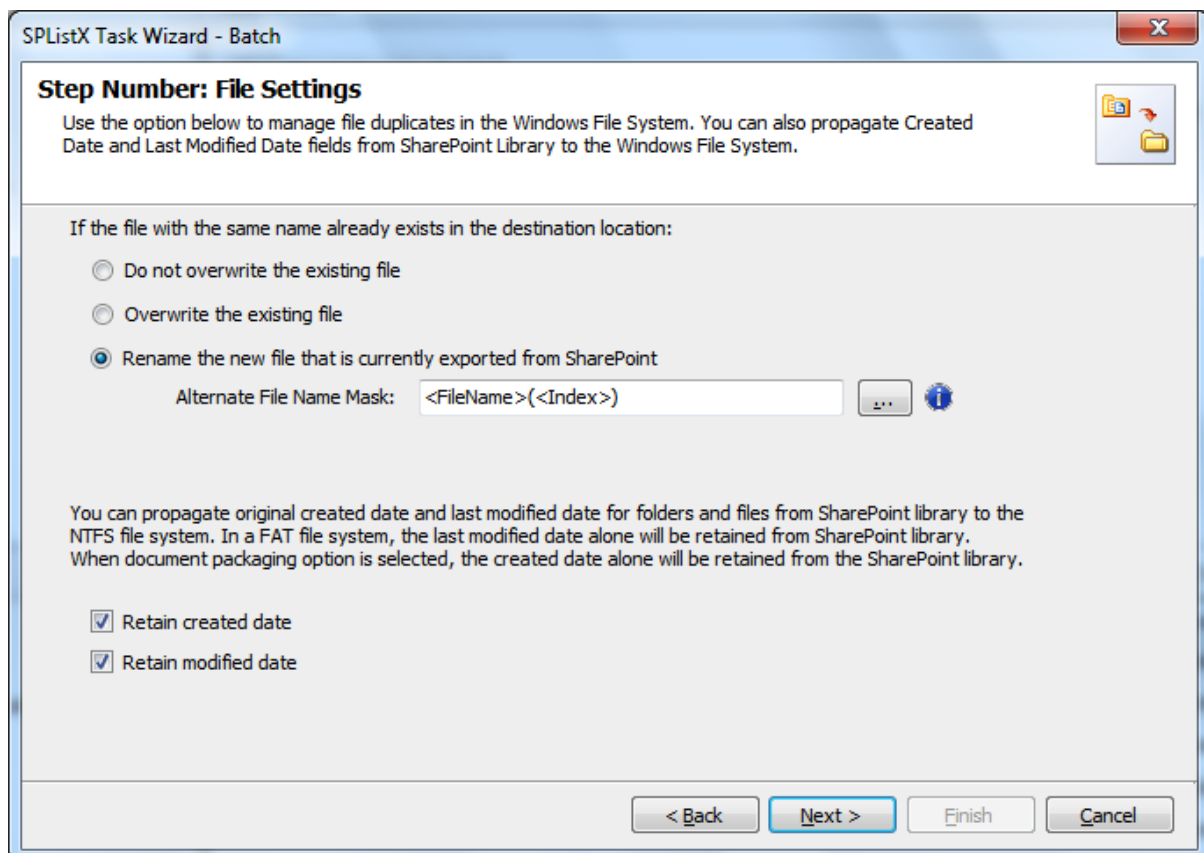
To select alternate file naming mask, click the **alternate file name mask** button placed next to the alternate file name mask textbox. **Alternate file name mask dialog** appears as shown below:



Construct alternate file naming mask with the available macros provided in the dialog. Click OK to close the dialog. The new files will be exported in the name format / syntax entered in the file naming mask.

### 2) File System Date Settings:

To propagate the system date fields - Created Date and Last Modified Date to respective folders and files in the file system, follow the steps outlined below:





## CHAPTER 5 – Export SharePoint List contents using the search option

Select File System Date Settings:

The date options given below will assign the respective data field values in the file system as in the original SharePoint list.

- a) Retain created date** - Carry forward / propagate Created Date field from the source folders, files and list item attachments to the Windows file system.
- b) Retain modified date** - Carry forward / propagate Last Modified Date field from the source folders, files and list item attachments to the Windows file system.

**NOTE:** You can propagate original Created Date and Last Modified Date for folders and files to the NTFS file system. In a FAT file system, the Last Modified Date alone will be retained as in source.

- 3)** Click **Next** to Proceed.

### 5.13 Metadata File Settings

**SPListX** will create metadata files based on the following options given below:

1) **The Metadata File Settings** step appears as shown below:

SPListX Task Wizard - Sample Task

**Step Number: Metadata File Settings**  
Specify destination path to store metadata file and export file format (CSV/XLSX/XML)

Metadata file name & location:

☒ Store metadata file(s) in this location C:\Users\Public\Documents\SPListX ... XLSX ▼

☐ Store metadata file(s) in format in the respective list folder location

If file already exists?

☒ Append metadata file ☐ Overwrite metadata file ☐ Tag timestamp with filename

New header names: (Optional)

Column Name	Header Name
Source URL	Source URL
Version Number	Version Number

Edit...

< Back Next > Finish Cancel

2) SPListX creates the metadata file using the List name and List GUID in the format - List Name (List GUID) to maintain a unique metadata file name.

3) Specify the **Metadata filename & location** using the options below:

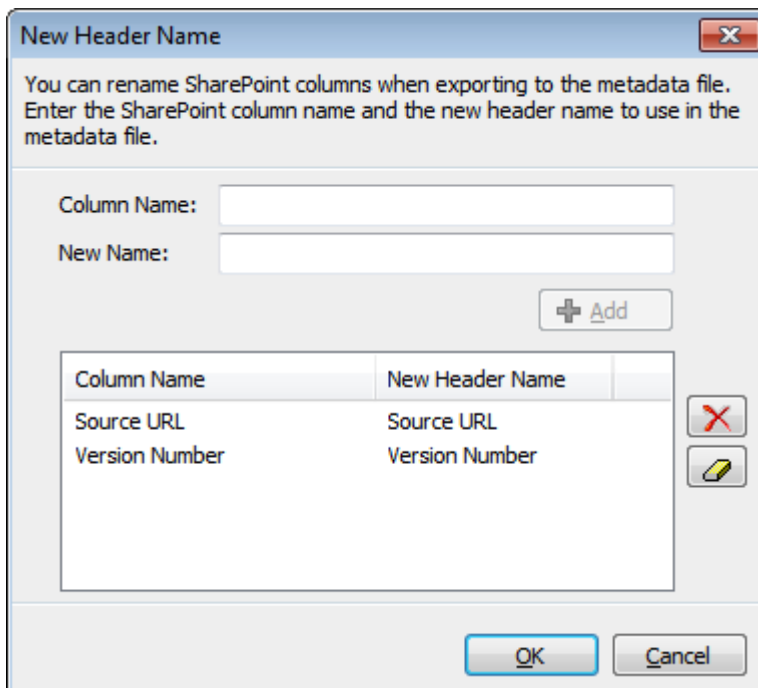
**a) Store metadata file(s) in this location:** Specify a folder path where the selected list items metadata are to be exported. You can also Click browse ('...') button to launch folder browser dialog.

**b) Store metadata file(s) in the respective list folder location:** - This option will export the metadata file in the selected file format into the respective list folder locations where the physical documents/ files are exported.

**NOTE:** Ensure that the user context used to run the SPListX export process has sufficient permissions to create, edit and delete folders and files in the specified export path.

## CHAPTER 5 – Export SharePoint List contents using the search option

- 4) If the metadata file already exists in the destination location, choose from any one of the following options:
- a) **Append:** This option will append the new metadata in the existing metadata file.
  - b) **Overwrite:** This option will overwrite the existing metadata file.
  - c) **Tag timestamp with file name:** This option will create a new metadata file tagged with a timestamp for each export.
- 5) You can specify new column names to use when generating the metadata file in the file system location. To use this feature, specify the new header names by clicking the Edit button. A New Header Dialog appears as shown below:



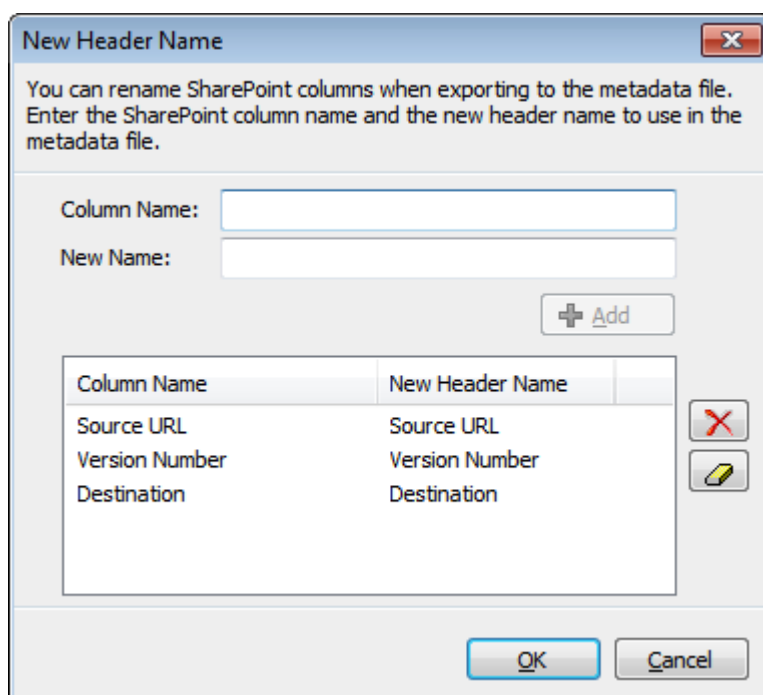
The dialog box is titled "New Header Name" and contains the following elements:

- A close button (X) in the top right corner.
- Instructional text: "You can rename SharePoint columns when exporting to the metadata file. Enter the SharePoint column name and the new header name to use in the metadata file."
- Two text input fields: "Column Name:" and "New Name:".
- An "+ Add" button to the right of the "New Name:" field.
- A table with two columns: "Column Name" and "New Header Name".
- Buttons for deleting (X) and editing (pencil) rows in the table.
- "OK" and "Cancel" buttons at the bottom.

Column Name	New Header Name
Source URL	Source URL
Version Number	Version Number

- 6) You can specify SharePoint column name in the **Column Name** textbox and a new field name to use in the **New Name** textbox. Click **OK**. For example, a SharePoint column named 'Department' in the source SharePoint list can be renamed as 'Location' when creating the metadata files during the export operation.

## CHAPTER 5 – Export SharePoint List contents using the search option



7) Click **Next** to Proceed.

### **XML File Format**

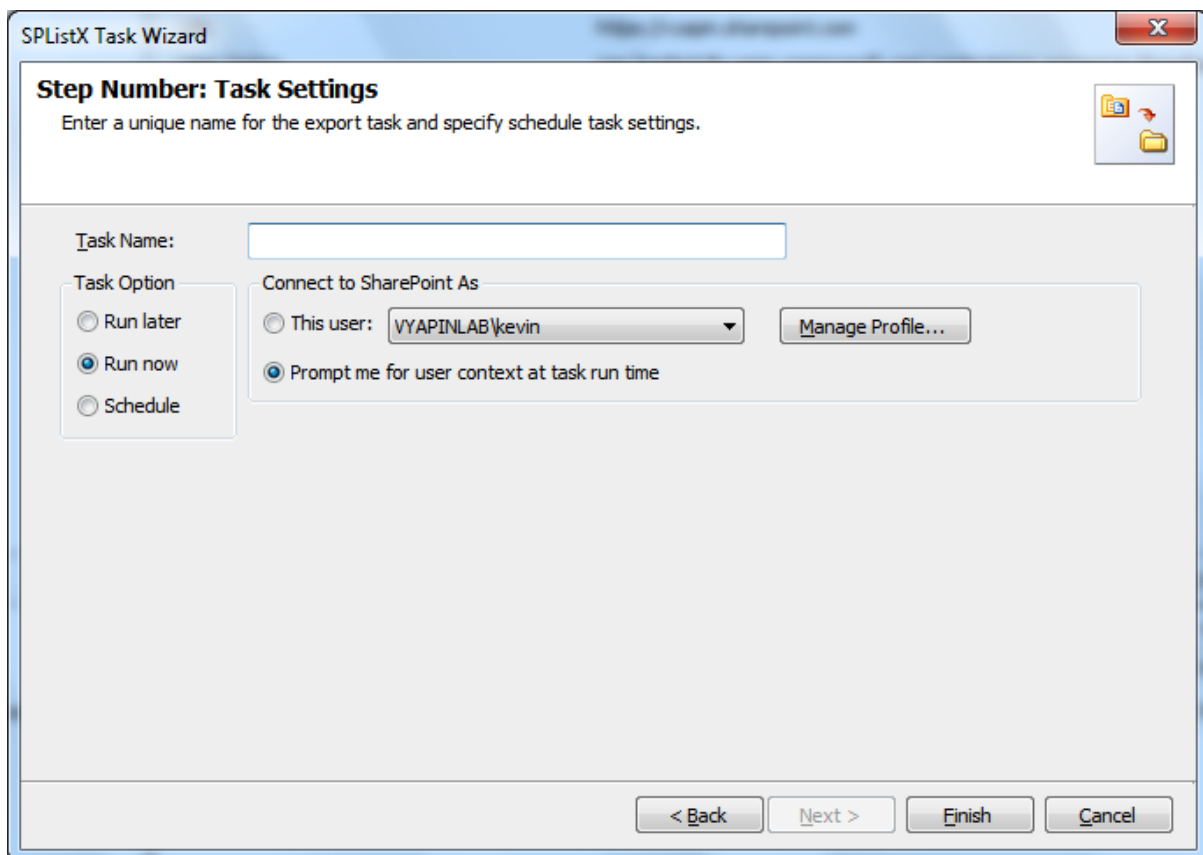
SPListX uses Document Type Definition (DTD) syntax to define the document structure of the XML metadata file. This declaration has been introduced primarily to support large XML metadata files, minimize memory footprint when working with large XML files and improve metadata file throughput.

XML metadata files are split into multiple text files and stored in a folder location that is constructed using the list name and its corresponding GUID. An XML file is created using the metadata filename specified by the user in the stated metadata file location. When you click the XML file, the text files in the folder are re-grouped using the DTD file to form a single XML file.

### 5.14 Task Settings

To specify the task name and schedule settings, follow the instructions given below. Please note that the task options will change depending on whether you are using Windows / Forms authentication or Web Single Sign-on credentials to connect to SharePoint.

1) **The Task Settings step** appears as shown below:



2) **Enter a unique task name** in Task Name textbox.

3) **Select a Task Option** from one of the following options:

- a) **Run later** - to run the task later as and when desired
- b) **Run now** - to run the task immediately after clicking Finish button
- c) **Schedule** - to create a Windows scheduled task. SPListX will create a schedule task in the Windows Scheduled Tasks applet with the stated settings. SPListX will perform the export based on the *Run As* user account specified in this export wizard step. The *Run As* account should be a valid Windows domain account.

## CHAPTER 5 – Export SharePoint List contents using the search option

**SPListX Task Wizard**

**Step Number: Task Settings**  
Enter a unique name for the export task and specify schedule task settings.

**Task Name:** Sample Task

**Task Option**

- ☐ Run later
- ☐ Run now
- ☒ Schedule

**Connect to SharePoint As**

- ☐ This user: VYAPINLAB\kevin [Manage Profile...](#)
- ☒ Use 'Run As' user context given below

**Schedule Settings**

**Run As:** VYAPINLAB\Administrator [Set Password...](#)

**Schedule:** Daily **Start time:** 18:32 [Advanced...](#)

**Schedule Task Daily**

Every 1 day(s)

At 18:32 every day, starting 08-05-2012

[< Back](#) [Next >](#) [Finish](#) [Cancel](#)

In scheduled export process, SPListX allows the user to enter different user credentials to connect to SharePoint and to create a scheduled export task (unattended mode).

By default, SPListX will use the user account specified in the scheduled 'Run As' user context to connect to SharePoint. In case, if you decide to use different user context to connect to SharePoint when running the scheduled task, you can do so by storing the SharePoint user context for future use.

SPListX will store the user credential to connect to SharePoint in the Microsoft Windows Stored User Names and Passwords / Credential Manager applet for security reasons. The stored user profile is tied to the user context (currently logged on user account) in which the profile is created. Hence, you will not be allowed to change the scheduled 'Run As' user context for the export task.

Click **Manage Profile** button to create new user profile.

- 5) As for **Web Single Sign-on** credential based export task, the task settings will be shown as below:

## CHAPTER 5 – Export SharePoint List contents using the search option

**SPListX Task Wizard**

**Step Number: Task Settings**

Enter a unique name for the export task and specify schedule task settings.

Task Name:

Task Option

- ☐ Run later
- ☒ Run now
- ☐ Schedule

Connect to SharePoint As

- ☐ This user:
- ☒ Prompt me for user context at task run time

< Back   Next >   Finish   Cancel

The Web Single Sign-on framework expects the user name and password to be given by user interactively in a browser based login dialog. Hence, the user profile list is not accessible for this type of connection.

- 6) As far as scheduled run is concerned, SPListX enables you to setup the export task using persistent connection and shared credential as shown below:

**SPListX Task Wizard**

**Step Number: Task Settings**

Enter a unique name for the export task and specify schedule task settings.

Task Name:

Task Option

- ☐ Run later
- ☐ Run now
- ☒ Schedule

Connect to SharePoint As

- ☐ This user:
- ☒ Use persistent session of the target site. [Check session status in Web SSO Dashboard](#)

Schedule Settings

Run As:

Schedule:  Start time:

Schedule Task Daily

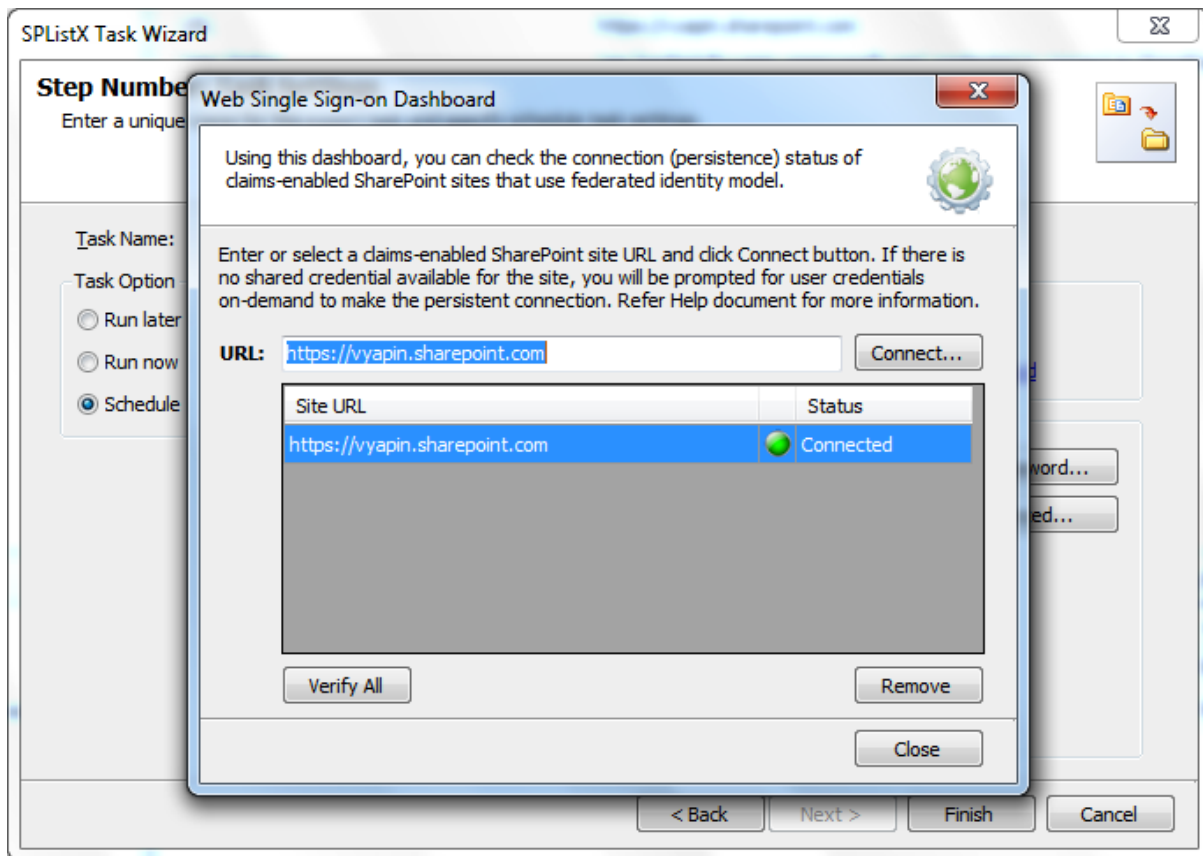
Every  day(s)

At 18:32 every day, starting 08-05-2012

< Back   Next >   Finish   Cancel

## CHAPTER 5 – Export SharePoint List contents using the search option

- 7) SPListX expects the user must ensure the persistent connectivity status using Web Single Sign-on dashboard. To check the status, click **Web SSO Dashboard** hyperlink.



- 8) Click **Finish** button to create the task.



### 5.15 Working on Search Results

---

#### With SharePoint Search Results

- **Working with SharePoint 2010 Search Results**
- **Working with SharePoint 2007 Search Results**

### 5.16 Working on SharePoint 2010 Search Results

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#### Working with Search Results

*Disclaimer: The information below can be specific to particular SharePoint environmental issues. The workarounds may or may not be suitable for your environment. Please consult your SharePoint Administrator before performing any changes to your SharePoint production environment.*

Protocol handler that crawls the SharePoint content will not populate ows\_created\_x0020\_By (Text) crawled property.

##### 1) How to map CreatedDate field to crawled field?

- Open Central Administration, in the **Application Management** section, click **Manage service applications**.
- Click the Search service application for which you are viewing managed and crawled properties.
- On the Search Administration page, in the Quick Launch, under **Queries and Results**, click **Metadata Properties**.
- On the Metadata Property Mappings page, click New Managed Property.
- On the New Managed Property page, in the Property name box in the Name and type section, type the name of the new managed property.
- In the Description box, type a description of the property.
- Under The type of information in this property, select one of the following options for the property:
- Under **The type of information in this property** Text type
- In the **Mappings to crawled properties** section, select **Include values from a single crawled property based on the order specified**
- Click Ok

## CHAPTER 5 – Export SharePoint List contents using the search option

The screenshot shows the 'Edit Managed Property' page in SharePoint 2010 Central Administration. The breadcrumb trail is 'Central Administration > Search Service Application: Edit Managed Property - CreatedDate'. The page title is 'Use this page to view and change the settings of this property.' The page is divided into several sections:

- Name and type:** Includes instructions to type a name and select a type. The 'Property name' is 'CreatedDate'. The 'Description' is empty. The 'The type of information in this property:' section has radio buttons for Text, Integer, Decimal, Date and Time, Yes/No, and a checked checkbox for 'Has Multiple Values'.
- Mappings to crawled properties:** Includes instructions on mapping crawled properties. It shows two radio buttons: 'Include values from all crawled properties mapped' (unchecked) and 'Include values from a single crawled property based on the order specified' (checked). Below is a list of 'Crawled properties mapped to this managed property:' with two entries: 'Basic:15(Date and Time)' and 'ows\_Created\_x0020\_Date(Text)'. To the right of the list are buttons for 'Move Up', 'Move Down', 'Add Mapping', and 'Remove Mapping'.
- Use in scopes:** Includes instructions on whether the property will be available for use in defining search scopes. There is a checked checkbox for 'Allow this property to be used in scopes'.

### 2) How crawling will affect export process of search results?

For example, if you performed search for the search query, Author='John Doe' using Trial search Dialog search results contains 1205 records approximately and save the search results. During export process search results count may increase to 1250 records approximately this is due to the incremental crawling of the content source.

### 3) How to avoid the "System.Services.TimeoutException" during export process of search results in SPListX?

During frequent usage of SharePoint, SharePoint Search services cannot serve the search request within the stipulated time therefore; SharePoint search server itself throws a System.ServiceProcess.TimeoutException. To avoid this exception, we strongly recommend you to perform search export process during off-peak hours.

### 4) How stemming will help you to get related search results?

Stemming will bring back words closely related to the query terms i.e. inflectional variants for most languages, but for some languages derivational variants as well.

## CHAPTER 5 – Export SharePoint List contents using the search option

For example, sample search queries with search results.

S.No.	Search Keywords	Search Results
1.	Run	In addition to exact match, it will bring back matches on "runs", "ran", "running".
2.	Page	In addition to exact match, it will bring back matches on "pages", "paged", and "paging".

### 5) How to enable stemming in SharePoint 2010?

- Go to the search page; enter any query to return the search results page. For ex: enter keyword 'sharepoint' in anykeywords text box.
- Under Site Actions, select 'Edit page'.
- Locate the 'Search Core Results' web part (usually in the bottom zone).
- From the Edit button, select 'Modify shared web part'.
- In the task pane that appears on the right hand side, under 'Results Query Options', select 'Enable Search Term Stemming' checkbox.

**NOTE:** If stemming is switched on, it will increase your index size and potentially impact search performance.

### 6) What is meant by Trimming Duplicate Search Results?

To specify whether duplicate list item URLs should be removed from search results.

### 7) How to view duplicate search results in SharePoint 2010?

- Go to the search page; enter any query to return the search results page. For example: enter keyword 'sharepoint' in any keywords text box.
- Under Site Actions, select 'Edit page'
- Locate the 'Search Core Results' web part (usually in the bottom zone)
- From the Edit button, select 'Modify shared web part'
- In the task pane that appears on the right hand side, under 'Results Query Options', check the box labelled ' Remove Duplicate Results '.

### 8) How to enable advanced search in SharePoint 2010?

Steps for crawling the content:

- Navigate to the central admin site.
- Click Shared Services Administration -> Search Settings -> Content sources and crawl schedules.
- Create Content Source and add the site URLs to be crawled and start full crawl of the content source.

## 5.17 Working on SharePoint 2007 Search Results

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### Working with Search Results

*Disclaimer: The information below can be specific to particular SharePoint environmental issues. The workarounds may or may not be suitable for your environment. Please consult your SharePoint Administrator before performing any changes to your SharePoint production environment*

Protocol handler that crawls the SharePoint content will not populate `ows_Modified_x0020_By(Text)` or the `ows_ModifiedBy(Text)`, `ows_created_x0020_By(Text)` crawled property.

#### 1) How to map LastModifiedBy and CreatedBy field to crawled field?

- Open Central administration -> Shared Services -> SharedServicesX (X being the number of the shared services provider for the site you are creating a mapping) -> search settings -> metadata property mappings.
- Click **"ModifiedBy"** to edit the properties.
- Make sure "Include values from all crawled properties mapped" is selected.
- Click "Add Mapping" and select the "Office" category from the dropdown list.
- Look for a property named "OFFICE:8" , click "OK".
- Click "Add Mapping" and select the "ows\_Last\_x0020\_Modified(text)" from the ALL categories dropdown list, Click "OK".
- Make sure the box is checked "Allow this property to be used in scopes", click "OK".
- Click **"CreatedBy"** to edit the properties.
- Make sure "Include values from a single crawled property based on the order specified" is selected.
- Click "Add Mapping" and select the "Office" category from the dropdown list.
- Look for a property named "OFFICE:4" , click "OK"

## CHAPTER 5 – Export SharePoint List contents using the search option

- Click "Add Mapping" and select the "ows\_Created\_x0020\_By(text)" from the ALL categories dropdown list, Click "OK".
- Make sure the box is checked "Allow this property to be used in scopes", click "OK".

Shared Services Administration: SharedServices1 > Search Settings > Managed Properties > Edit Managed Property

### Edit Managed Property - CreatedBy

Use this page to view and change the settings of this property.

<b>Name and type</b> Type a name for this property, and select the type of information you want to store in this property.	Property name: * <input type="text" value="CreatedBy"/> Description: <input type="text"/> The type of information in this property: Text					
<b>Content using this property</b> This section displays the number of items found with this property.	Number of items found with this property: more than 1000					
<b>Mappings to crawled properties</b> A list of crawled properties mapped to this managed property is shown. To use a crawled property in the search system, map it to a managed property. A managed property can get a value from a crawled property based on the order specified using the Move Up and Move Down buttons or from all the crawled properties mapped.	<p><input type="radio"/> Include values from all crawled properties mapped</p> <p><input checked="" type="radio"/> Include values from a single crawled property based on the order specified</p> <p>Crawled properties mapped to this managed property:</p> <table><tr><td>Office:4(Text)</td><td rowspan="4">Move Up Move Down Add Mapping Remove Mapping</td></tr><tr><td>ows_Created_x0020_By(Text)</td></tr><tr><td> </td></tr><tr><td> </td></tr></table>	Office:4(Text)	Move Up Move Down Add Mapping Remove Mapping	ows_Created_x0020_By(Text)		
Office:4(Text)	Move Up Move Down Add Mapping Remove Mapping					
ows_Created_x0020_By(Text)						
<b>Use in scopes</b> Indicates whether this property will be available for use in defining search scopes.	<input checked="" type="checkbox"/> Allow this property to be used in scopes					

Delete OK Cancel

### 2) How crawling will affect export process of search results?

For example, if you performed search for the search query, Author='John Doe' using Trial search Dialog search results contains 1205 records approximately and save the search results. During export process search results count may increase to 1250 records approximately this is due to the incremental crawling of the content source.

### 3) How to avoid the "System.Services.TimeoutException" during export process of search results in SPListX?

During frequent usage of SharePoint, SharePoint Search services cannot serve the search request within the stipulated time therefore, SharePoint search server itself throws an System.ServiceProcess.TimeoutException. To avoid this exception, we strongly recommend you to perform search export process during off-peak hours.

## CHAPTER 5 – Export SharePoint List contents using the search option

### 4) How stemming will help you to get related search results?

Stemming will bring back words closely related to the query terms i.e. inflectional variants for most languages, but for some languages derivational variants as well. For example, sample search queries with search results.

S.No.	Search Keywords	Search Results
1.	run	In addition to exact match, it will bring back matches on "runs", "ran", "running".
2.	page	In addition to exact match, it will bring back matches on "pages", "paged", and "paging".

### 5) How to enable stemming in MOSS 2007?

- Go to the search page; enter any query to return the search results page. For ex: enter keyword 'sharepoint' in anykeywords text box.
- Under Site Actions, select 'Edit page'.
- Locate the 'Search Core Results' web part (usually in the bottom zone).
- From the Edit button, select 'Modify shared web part'.
- In the task pane that appears on the right hand side, under 'Results Query Options', select 'Enable Search Term Stemming' checkbox.

**Note: If stemming is switched on, it will increase your index size and potentially impact search performance.**

### 6) What is meant by Trimming Duplicate Search Results?

To specify whether duplicate list item URLs should be removed from search results.

### 7) How to view duplicate search results in MOSS 2007?

- Go to the search page; enter any query to return the search results page. For example: enter keyword 'sharepoint' in any keywords text box.
- Under Site Actions, select 'Edit page'
- Locate the 'Search Core Results' web part (usually in the bottom zone)
- From the Edit button, select 'Modify shared web part'
- In the task pane that appears on the right hand side, under 'Results Query Options', check the box labelled ' Remove Duplicate Results '.

### 8) How to enable advanced search in WSS 3.0?

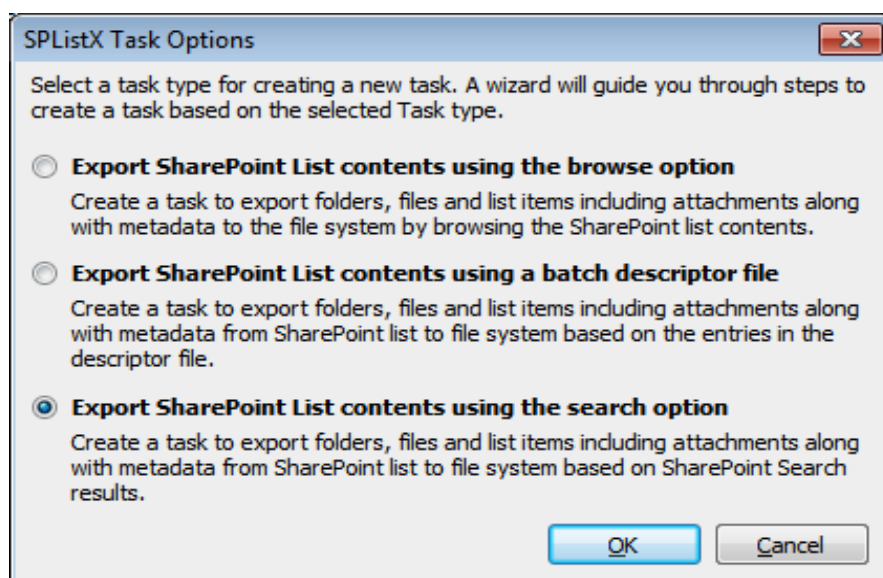
Install SQL Search Server Express Edition 2008 in WSS 3.0 SharePoint Server.  
Steps for crawling the content:

- Navigate to the central admin site.
- Click Shared Services Administration -> Search Settings -> Content sources and crawl schedules.
- Create Content Source and add the site URLs to be crawled and start full crawl of the content source.

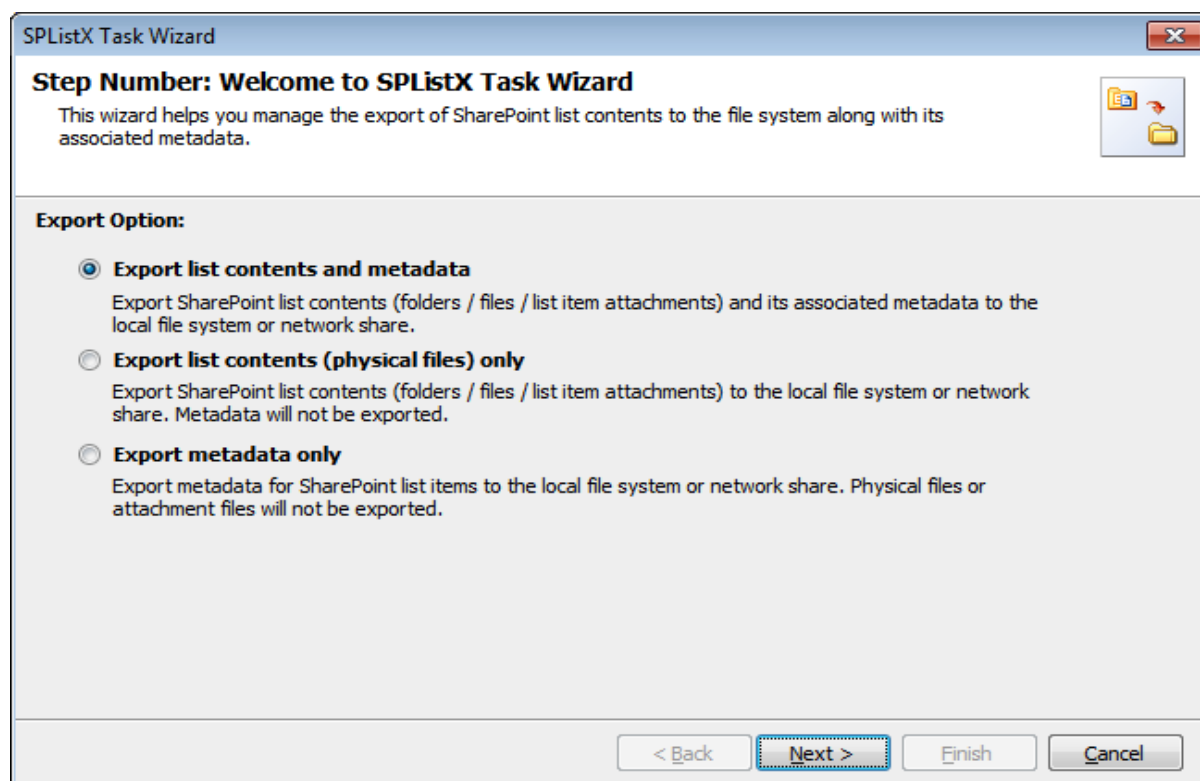
### 5.18 How to Create Batch File Using Search Results

#### Steps for creating batch file using search results

- 1) **Select Export SharePoint List contents using the search option in SPListX Task Options** dialog as shown below and *click OK*.



- 2) **The SPListX Task Wizard appears as shown below:**



## CHAPTER 5 – Export SharePoint List contents using the search option

Click **Next** button.

### 3) Specify **Search URL Settings**

### 4) Specify **Search Conditions**

SPListX Task Wizard

**Step Number: Search Conditions**

This wizard helps you manage the export task settings.

All of these words:  Any of these words:

The Exact phrase:  None of these words:

Result Type:  Scope:

**Narrow the search**

Property:  ...

Operator:  Logical operator: ☒ And ☐ Or

Value:

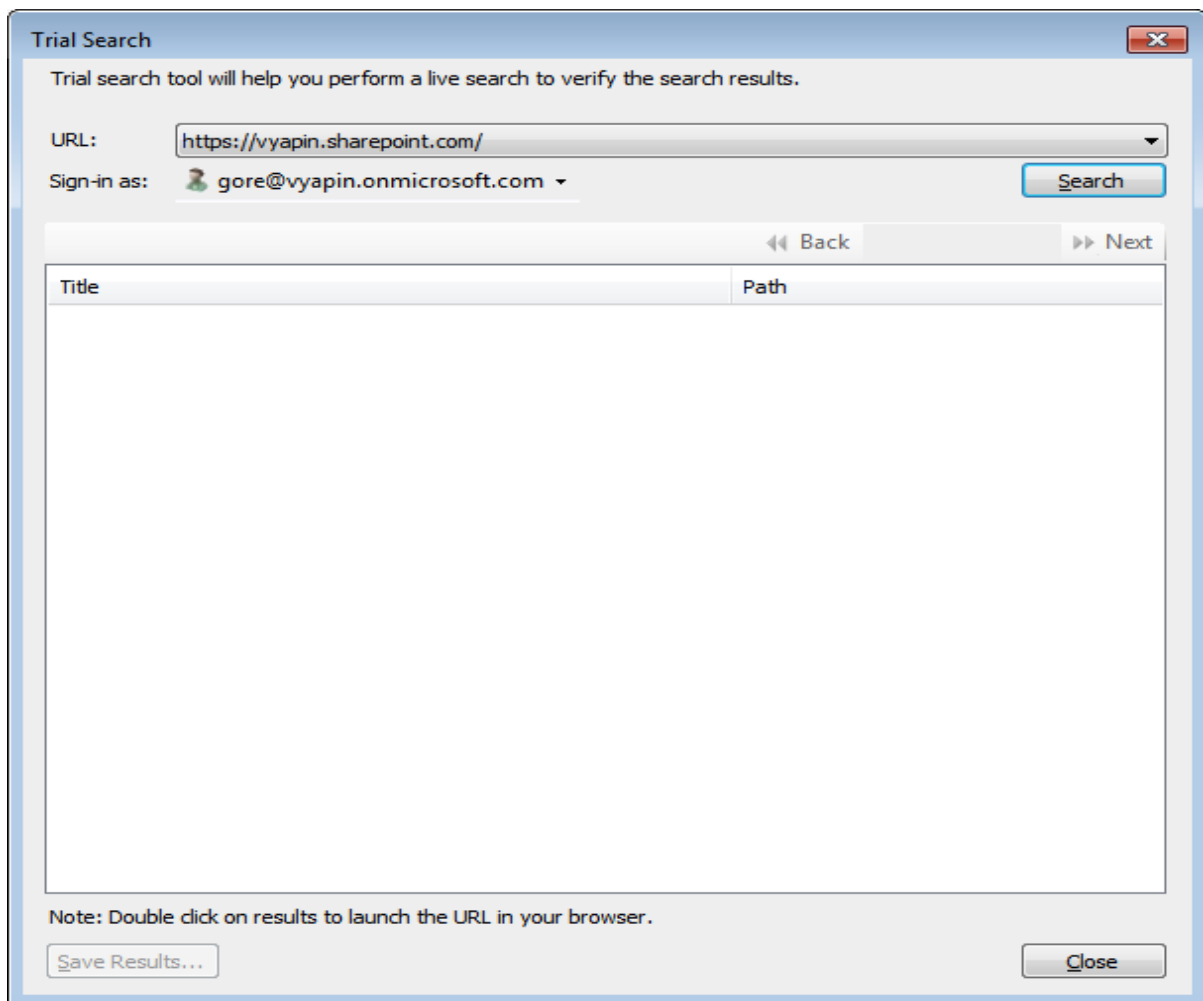
**Property restrictions:**

Click **Trial Search** button to invoke Trial Search tool. The Trial Search tool will help you perform a live search against the query and help you verify the search results.

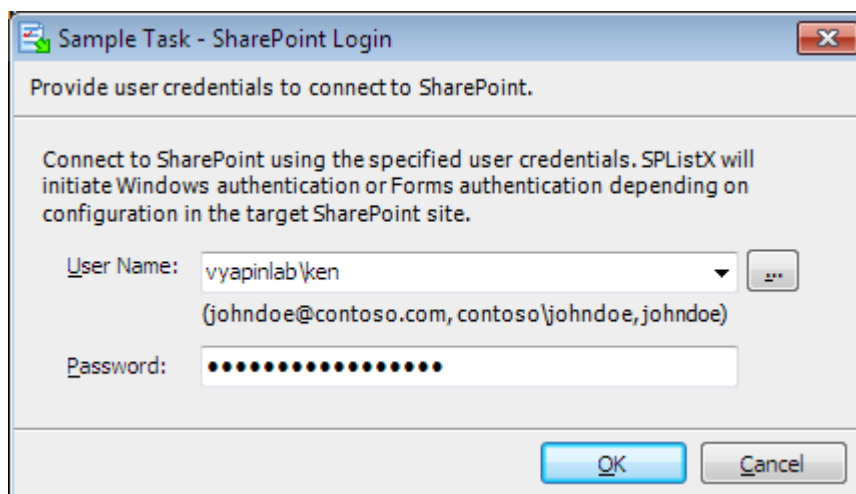


## CHAPTER 5 – Export SharePoint List contents using the search option

The **Trial Search** *Dialog* appears as shown below:

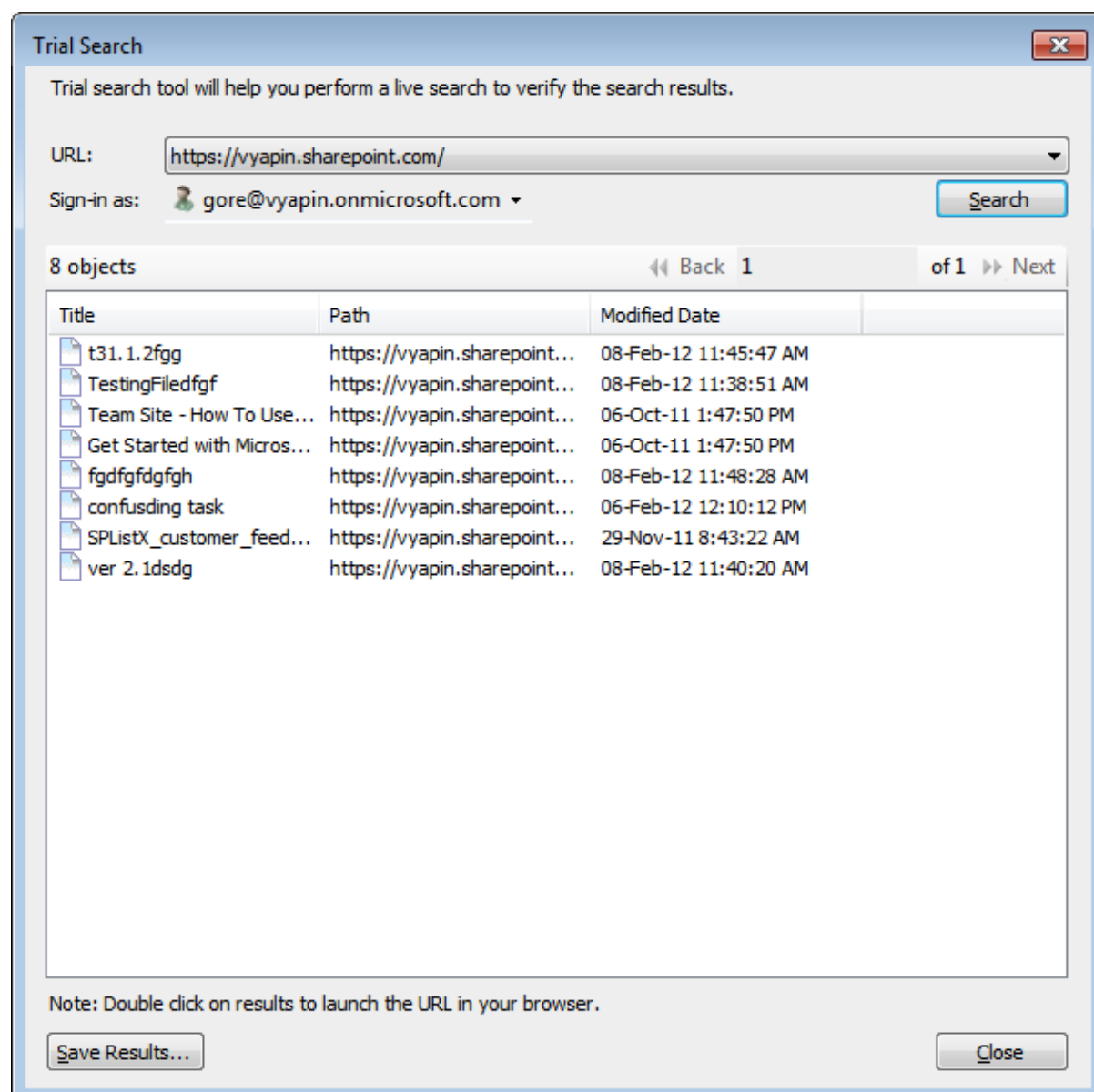


- a) Select URL from the **URL** drop-down.
- b) The **SharePoint Login Dialog** to connect to SharePoint will appear as shown below. Enter a valid user credential to connect to SharePoint.



- c) Click **Search** button to perform search.

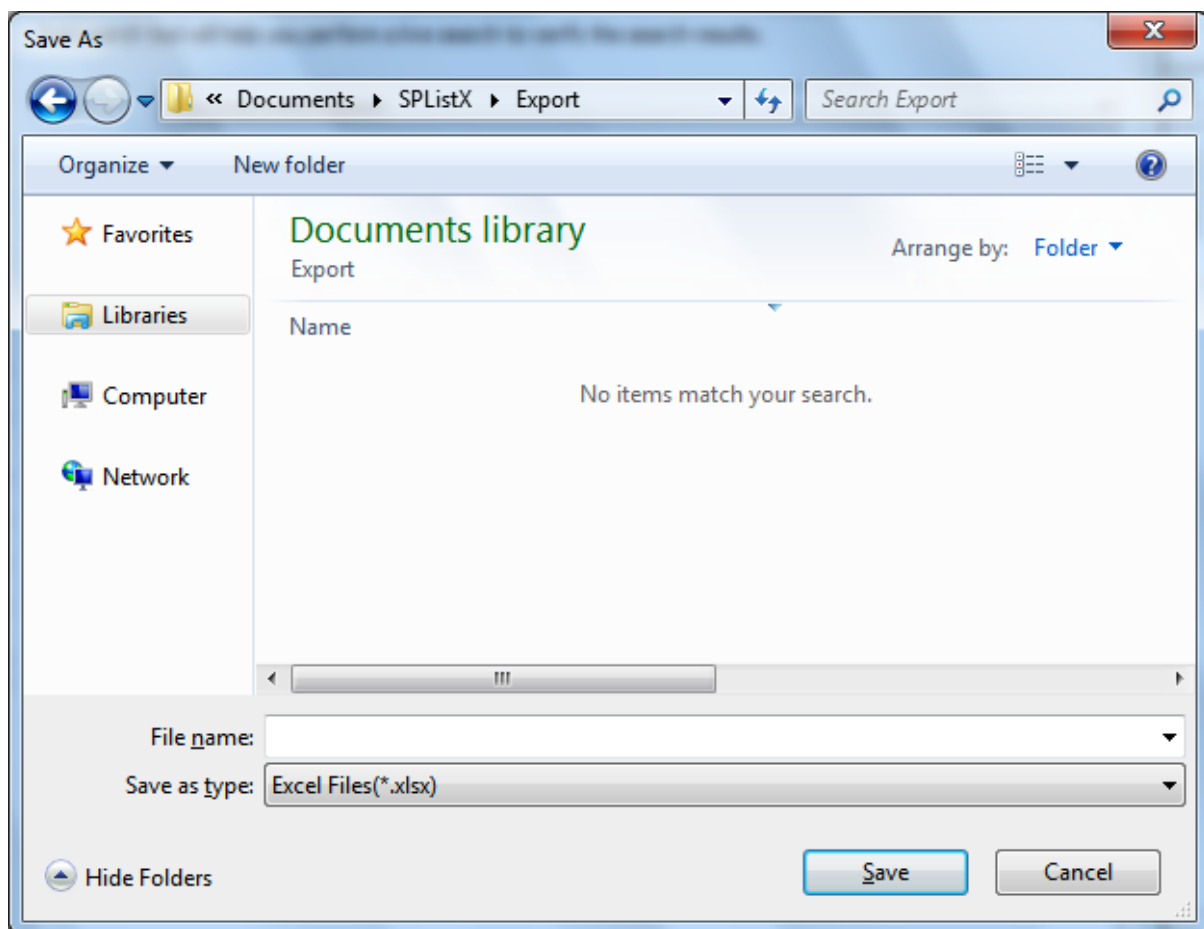
## CHAPTER 5 – Export SharePoint List contents using the search option



Click **Save Results** button to save the search results.

## CHAPTER 5 – Export SharePoint List contents using the search option

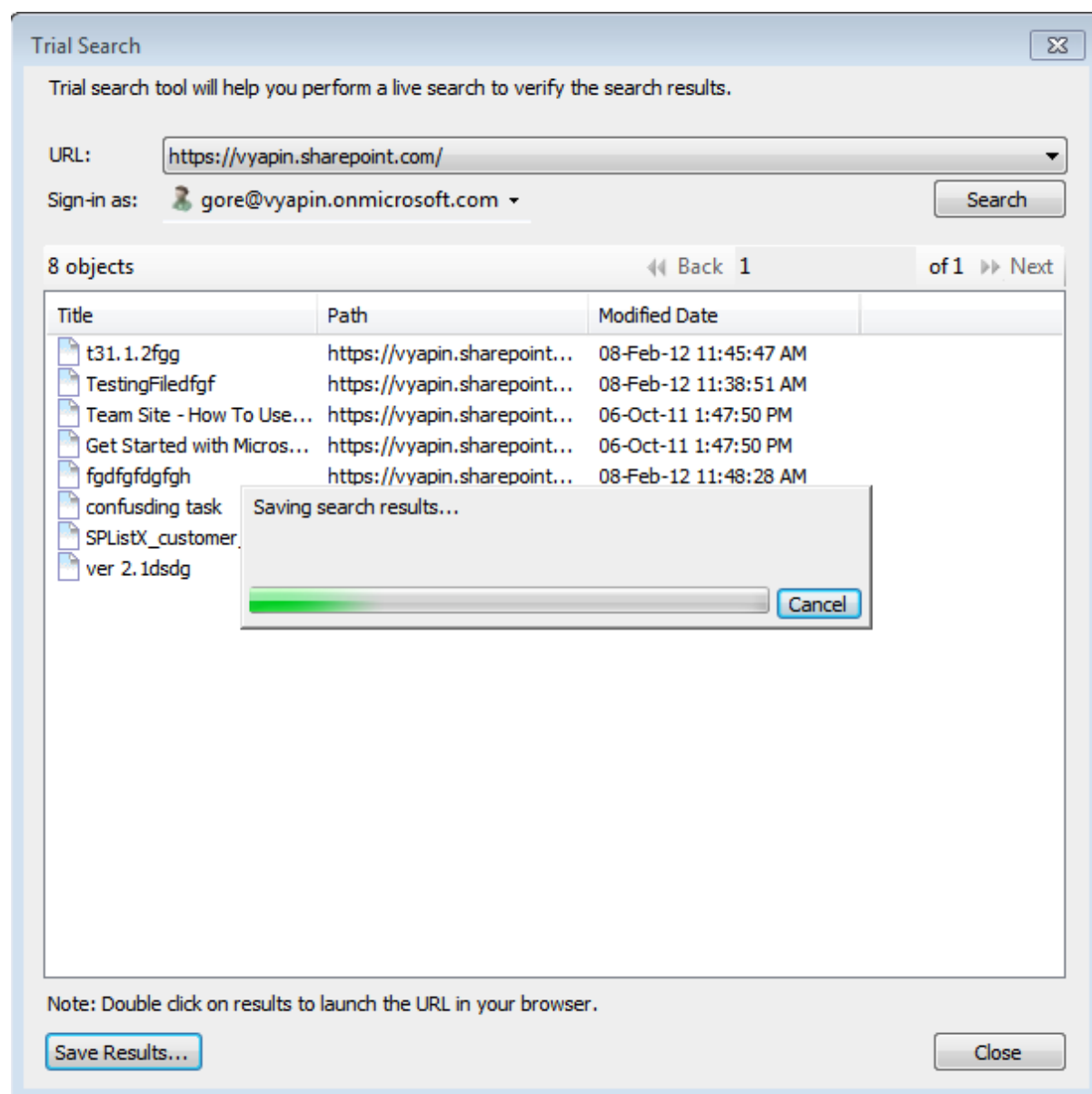
- The **Save As** dialog appears as shown below:



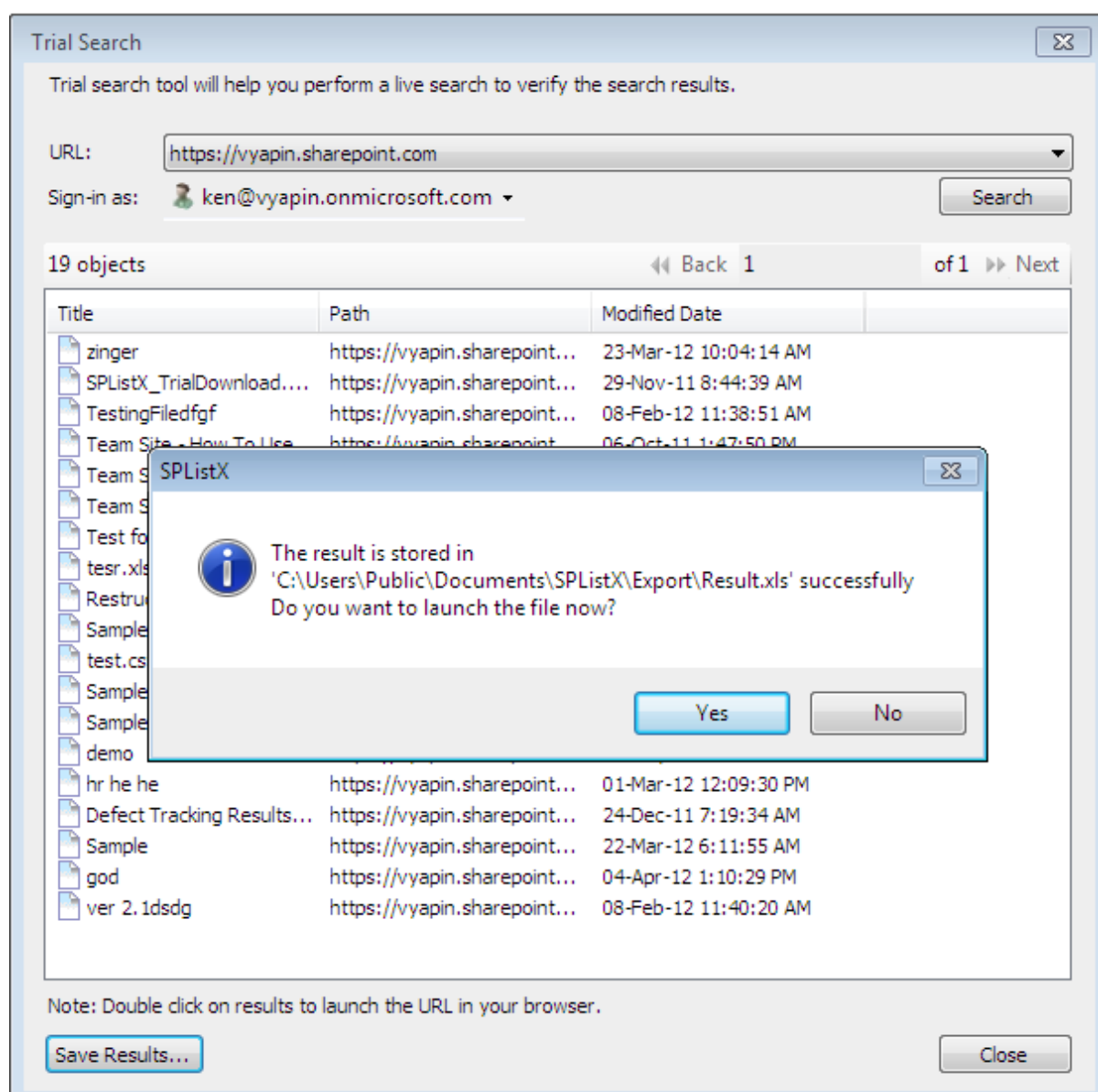
- Specify file name and Click **OK** button.

## CHAPTER 5 – Export SharePoint List contents using the search option

- While saving search results the **Trial search dialog** appears like this:



## CHAPTER 5 – Export SharePoint List contents using the search option



Click **yes** to launch the file.

Click **Close** button to close the dialog.

### 5) Sample Search Result format in CSV

"Title", "Path", "Created Date, Modified Date

"Purchase", "http://vyapin/Purchase document/purchase  
report.xls", "2/11/2009", "2/15/2009"

"Marketing", "http://vyapin/Purchase  
document/marketing.ppt", "2/11/2009", "2/15/2009"

Account Report", "http://vyapin/Purchase document/Account  
Report.xls", "2/11/2009", "2/15/2009"

## CHAPTER 5 – Export SharePoint List contents using the search option

### 6) Steps to modify the search results.

(i) Remove the Columns created date, modified date, title from the file.

(ii) Add Destination Path Column and specify the file path.

Sample Batch file format for CSV

"Path", "Destination Path"

"http://http://vyapin/Purchase document/purchase report.xls", "C:\My Documents"

"http://http://vyapin/Purchase document/marketing.ppt", "\\vyapinfo\ExportDocs\shared doc contents"

"http://http://vyapin/Purchase document/Account Report.xls", "C:\My Sales\Lists Backup"

### 7) Create a task to Export SharePoint List contents using a batch descriptor file

## 6 References

### 6.1 Error Messages and Resolution

#### Resolution Tips

You may notice one or more of the error messages given below when using SPListX to connect to SharePoint and perform an export. This is not an exhaustive compilation of all error messages, but an attempt to include as many known error messages and how to resolve the errors. Please refer **Troubleshooting** section for more information.

Error Message	Resolution
The remote server returned an error: (407) Proxy Authentication Required.	Enable the <b>Bypass proxy server for local addresses</b> option available at <b>LAN Settings of Internet Options</b> of Internet Explorer Browser.
Unable to establish existence of the account specified.	The user account specified in the scheduled task should be a trusted domain user account.
Source folder or file not found	Ensure that the given Source Path is valid and available. Invalid or unavailable source paths will result in this error.
Unable to locate list with the specified URL	Ensure that the given source list URL is valid and exists.
Unable to locate destination folder with the specified path	Ensure that the given destination folder location is valid and exists.
The file is checked out or locked for editing by user	This error may occur when reading a file in SharePoint, if the given file is checked out and exclusively locked by another user.
The Microsoft Jet database engine cannot open the file '<file name>'. It is already opened exclusively by another user, or you need permission to view its data.	Ensure that the specified file is not currently in use / open by any other application or user. Close the file and try again (or) close and re-launch SPListX

## CHAPTER 6 – References

	application.
The 'Microsoft.ACE.OLEDB.12.0' provider is not registered on the local machine.	Ensure that the machine running SPListX has either Microsoft Office 2007 Suite or Office 2007 System Driver (Data Connectivity Components) installed.
Export Condition failed	Ensure that the specified column in export condition exists in the source SharePoint List.
Ignored Export Condition not satisfied	The list / folder / list item do not satisfy the export condition specified in the task settings. SPListX will log this message in the Activity log and the list / folder / list item will be skipped for export.
Cannot export the column '<Column name>' values, since the column could not be found in the SharePoint List"	Ensure that the specified column in export metadata for specific columns exists in SharePoint List.
Search Condition failed	Ensure that the specified managed property in search condition exists in the source SharePoint service provider.
Cannot export the view '<View name>' values, since the view could not be found in the SharePoint List"	Ensure that the specified view exist in SharePoint List.
Search Condition failed	Ensure that the specified managed property in search condition exists in the source SharePoint Service Provider.
Unable to export membership information for the following SharePoint Group(s): <group list>	The user account specified to access membership information does not have sufficient permission to retrieve the members of the respective SharePoint Groups.
Unable to export membership information for the following Domain Group(s): <group list>	The user account specified in the Active Directory Profile Manager does not have sufficient permission to retrieve the members of the respective Domain Groups. Specify a different user account if necessary.



### 6.2 Troubleshooting

---

If and when a problem arises, please forward the following files to support@vyapin.com to revert back to you with a solution. These files will be available where SPListX is installed.

- 1)** *Error log file - e.g., <Application Data Folder>\SPListX\Log\SPListXErrorLog.txt*
- 2)** *For issues while running a task, the Activity Log and Error Log files will be generated in a date and time-stamp folder within the task folder name under TaskHistory folder.*
  - a)** *Activity log file - e.g., <Application Data Folder>\SPListX\TaskHistory\SPListX Task\20110523-183919\logs\ActivityLog.txt*
  - b)** *Error log file - e.g., <Application Data Folder>\SPListX\TaskHistory\SPListX Task\20110523-183919\logs\ActivityErrors.txt*
  - c)** *Metadata log file - e.g., <Application Data Folder>\SPListX\TaskHistory\SPListX Task\20110523-183919\logs\MetadataErrors.txt*
  - d)** *SPListX error log file - e.g., <Application Data Folder>\SPListX\TaskHistory\SPListX Task\20110523-183919\logs\SPListXErrorLog.txt*
  - e)** *Task settings file - e.g., <Application Data Folder>\SPListX\TaskHistory\SPListX Task\20110523-183919\settings\Details.xml*
  - f)** *Library settings file - e.g., <Application Data Folder>\SPListX\TaskHistory\SPListX Task\20110523-183919\settings\LibrarySettings.xml*
  - g)** *Process details file - e.g., <Application Data Folder>\SPListX\TaskHistory\SPListX Task\20110523-183919\settings\ListItemProcessCount.xml*

**NOTE:** <Application Data Folder> is the common area where SPListX tasks and task history will be stored in the machine running SPListX. The <Application Data Folder> specified at the time of installing SPListX can be found from the **Help -> About** screen. The default path of <Application Data Folder> is as follows:

- Windows XP, Windows Server 2003 - C:\Documents and Settings\All Users\Documents
- Windows 7/ Vista, Windows Server 2008 - C:\Users\Public\Documents

### 6.3 How to Uninstall SPListX?

When you create SharePoint export tasks in SPListX, the application creates Windows Scheduled Tasks (to run the export tasks at the specified time interval) where SPListX is installed. Export task results for every task run instance is also maintained in the computer as application files.

When you uninstall SPListX through Control Panel - Add / Remove Programs applet, Windows Installer program will remove only the application files from your machine. But, the application related files created by SPListX remain in the computer. In order to remove SPListX worker files completely, the uninstall wizard provides a set of cleanup options to perform the cleanup operation based your selection.

Use this wizard to cleanup the files that are created by SPListX for SharePoint 2010 application selectively and uninstall SPListX completely from the machine.

- 1) **Launch the uninstall wizard by clicking Start -> Programs -> SPListX for SharePoint 2010 -> SPListX Uninstall Wizard.**

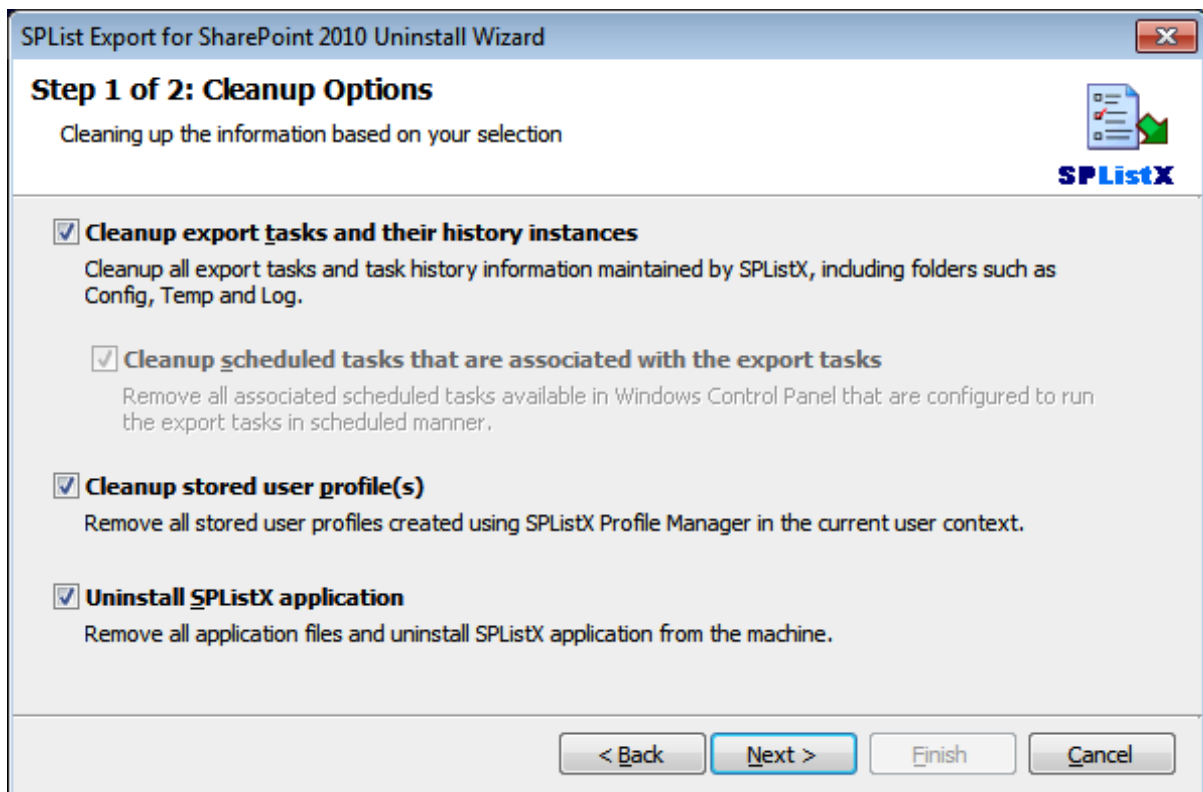
The **SPListX Uninstall Wizard** dialog will be shown as below:



Click **Next** to proceed.

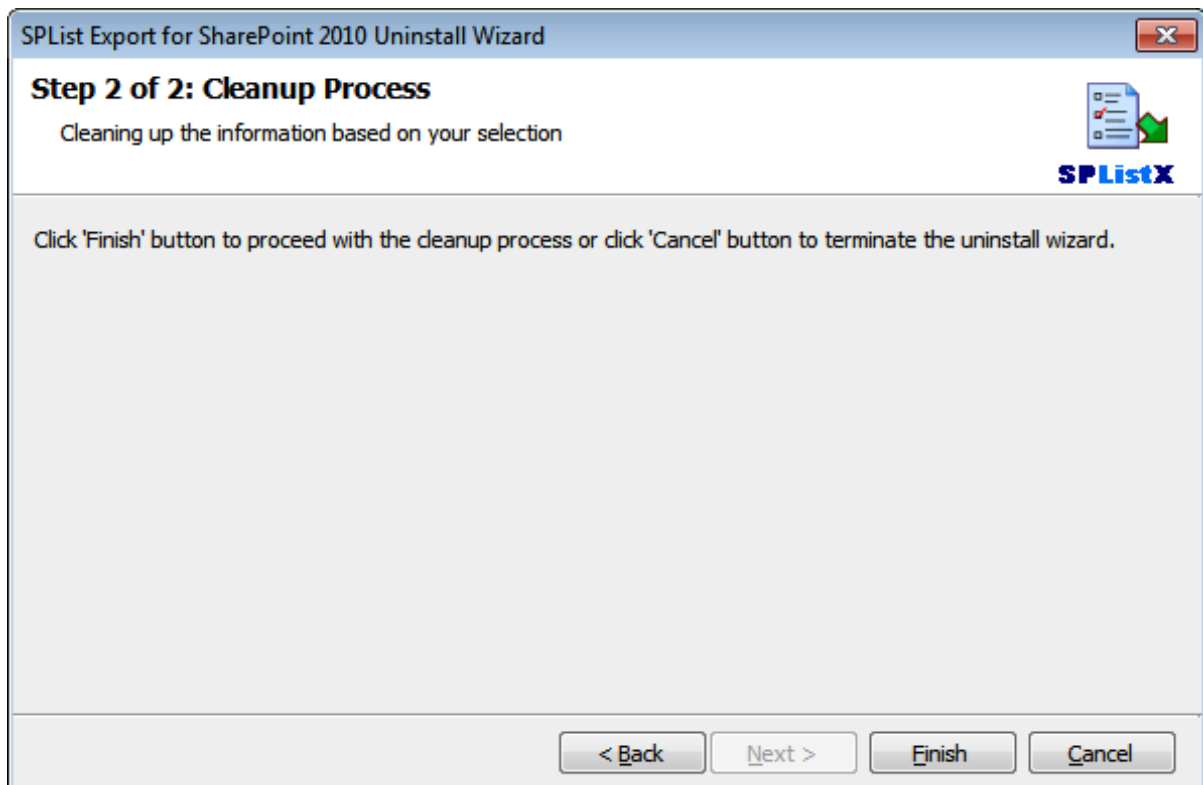
## CHAPTER 6 – References

2) Select required **cleanup options** as shown below:



Click **Next** to proceed.

3) Confirm the **cleanup** and/or **uninstall process**.



## CHAPTER 6 – References

Click **Finish** to run cleanup and/or uninstall process. Click **Cancel** to close the wizard.

- 4) Once the file cleanup process is complete, the uninstall wizard will automatically run *Windows Installer* program to remove SPListX application from the machine, if you have selected the cleanup option **Uninstall SPListX application** in the wizard.

## 7 Index

---

- Activate dialog, 4
- Activate screen, 3
- activate the software., 3
- Activity Log, 36, 38, 39, 40, 168
- Add Fields Dialog, 67, 98, 140
- applet, 29, 45, 80, 89, 110, 117, 152, 169
- Application Data*, 2, 10, 37, 168
- attachment folder, 71, 72, 73, 101, 102, 103, 143, 144, 146
- batch descriptor file, 1, 12, 13, 14, 82, 84, 86, 88, 114, 115, 119, 165
- Batch descriptor file, 88
- Batch File*, 119, 158
- browse option, 12, 13, 14, 41, 49
- Cleanup history, 28, 36, 37
- cleanup operation, 169
- cleanup options, 169, 170
- Column Settings Options*, 42, 83, 113
- Comma delimited, 77, 88, 106, 119, 149
- command line, 20
- connect to SharePoint, 45, 89, 117, 130, 160
- Copy Task, 7, 15, 16
- crawling, 155, 157
- created date, 76, 105, 147, 165
- CreatedBy, 154
- credential, 19, 21, 29, 31, 44, 45, 89, 116, 117, 130, 160
- Credential Dialog, 19, 21
- Credential Manager, 29, 45, 89
- credentials, 20, 44, 45, 89, 116
- CSV, 77, 84, 85, 86, 88, 106, 114, 115, 119, 131, 149, 164, 165
- Ctrl+N, 12
- date range, 63, 94, 135
- Date Settings*, 42, 75, 83, 105, 113, 147
- Default favorite*, 34
- Delete Task, 7, 16, 17
- Destination Folder, 70, 83, 100, 142

## CHAPTER 7 – References

destination location, 1, 47, 48, 49,  
58, 70, 71, 100, 101, 142, 143

'Destination Path', 84, 85, 114, 115

*DomainName*, 44, 116

DOS batch file, 22

Download evaluation/trial copy, 4

drop down, 89, 119

Edit Task, 7, 14

Elapsed Time, 8, 28

Equivalent Format String, 84, 114

*Error log file*, 168

Error Message, 166

Eval limit, 28

*Export Conditions*, 42, 64, 65, 67,  
83, 95, 96, 98, 113, 136, 137, 139

Export Options, 43, 87

Extensible Mark-up Language, 77,  
107, 149

Favorites, 32, 35, 45, 79, 109, 151

favorites list, 32

*Files Overwritten*, 39

Folder Traversal option, 58

grid view, 57

Hardware configuration, 2

Install the software, 4

Intel Pentium processor, 3

Items to export, 47, 59

keyword search, 50, 51, 56, 128

license key, 4

list contents, 1, 12, 43, 87

List contents, 12, 13, 14, 41, 82, 84,  
112, 114, 158, 165

list items, 1, 6, 12, 41, 43, 44, 48,  
49, 50, 56, 57, 58, 64, 66, 69, 71,  
77, 78, 84, 85, 87, 88, 95, 97, 100,  
101, 106, 107, 112, 124, 125, 128,  
136, 138, 141, 143, 148, 149

'List Separator', 84, 114

*Metadata*, 42, 43, 76, 77, 83, 87,  
106, 107, 113, 148, 149

metadata file, 77, 78, 85, 107, 115,  
149

modified date, 76, 105, 148, 165

ModifiedBy, 154

MOSS 2007, 156

overwrite a file, 72, 102, 145

parenthesis, 65, 68, 96, 99, 137,  
140

Press Del key, 17

Profile Manager, 20, 29, 30, 31

References, 172

*Resolution*, 39, 40, 166

*Resolution Tips*, 39, 40

Retain task history, 37

## CHAPTER 7 – References

**Schedule task, 80, 110, 152**

**Search Conditions, 113, 124, 159**

**search option, 12, 13, 14, 112, 114, 158**

**Search Options, 56, 128**

**Search Tuner, 55, 56, 127**

**Search URL, 119, 159**

**'Service Pack', 2**

***Set as default, 34***

**SharePoint, 1, 6, 12, 13, 14, 19, 20, 21, 29, 31, 32, 33, 35, 39, 41, 42, 43, 44, 45, 48, 49, 50, 52, 53, 54, 58, 64, 66, 67, 68, 75, 78, 82, 84, 85, 87, 88, 89, 95, 97, 98, 99, 105, 108, 112, 113, 114, 115, 116, 117, 120, 124, 125, 126, 130, 136, 138, 139, 140, 147, 150, 154, 155, 157, 158, 160, 165, 166, 167, 169**

**source list, 58, 63, 64, 94, 95, 135, 136**

***source location, 42, 44***

**SPList Export, 1**

**SPListX, 1, 2, 3, 5, 6, 7, 10, 12, 14, 15, 16, 18, 20, 21, 22, 23, 24, 25, 27, 28, 29, 31, 32, 36, 37, 38, 41, 42, 44, 45, 56, 57, 58, 64, 66, 68, 70, 77, 80, 82, 83, 88, 89, 95, 97, 99, 100, 101, 106, 110, 112, 113, 116, 117, 124, 125, 128, 136, 138, 141, 142, 149, 152, 155, 158, 166, 167, 168, 169, 171**

***SPListXErrorLog.txt, 168***

**SPListXTaskRunner, 21, 22**

**SQL, 157**

**stemming, 56, 128, 155, 156**

**System requirements, 3**

**Task Details, 6, 8**

**Task History, 6, 8, 19, 21, 27, 36, 38**

**task history item, 26, 28, 36, 38, 40**

**Task List pane, 6, 7, 8, 14, 15, 16, 18, 23, 27**

**Task Option, 80, 110, 152**

**Task Properties, 6, 7**

***Task Results, 39***

**Task Settings, 40, 42, 80, 83, 110, 113, 152**

***Task Statistics, 39***

**task status, 25, 28**

**Task Status, 25, 36**

***Task Wizard, 14, 24, 42, 83, 113, 158***

**Technical Support, 2**

**Terminated abnormally, 28**

***timestamp, 37, 70, 100, 142***

**Tools menu, 25, 29, 32, 36, 37, 38**

**Traversal dialog, 58**

**Trial Search, 129, 159, 160**

## CHAPTER 7 – References

- Trimming, 156
- Troubleshooting, 166, 168
- uninstall process, 170, 171
- Uninstall SPListX application*, 171
- Uninstall Wizard, 169
- URL drop-down., 129, 160
- URLs, 56, 119, 128, 156, 157
- User Credential, 113, 116
- user profile, 29, 30, 31, 44, 45, 89, 117
- Version information, 2
- Version Options, 42, 63, 83, 94, 113, 135
- version range, 63, 73, 94, 103, 135, 145
- View activity log*, 26, 28
- Vista,, 2, 168
- wildcard, 84
- wildcard characters, 84
- Windows 7, 2, 3, 168
- Windows 7/, 2, 168
- Windows Schedule Task, 23
- Windows Server, 2, 3, 168
- Windows Server 2003, 2, 168
- Windows Server 2008 -, 2, 168
- Windows Stored User Names and Passwords, 29, 45, 89, 117
- Windows Task, 1, 23, 24
- Windows XP,, 2, 168
- WSS 3.0, 128, 157
- XLS, 77, 85, 88, 106, 115, 119, 149
- XLSX, 85, 88, 115, 119
- XML, 77, 107, 149